EAST DEVON DISTRICT COUNCIL TOURISM STRATEGY

View from the Hill Consulting Limited

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SUMMARY

As part of our Council vision, we are striving to provide a healthier, more beautiful natural environment that inspires, educates and involves residents and visitors to East Devon. Tourism plays an integral part of this vision and brings many economic and social benefits, helping support our local cultural activities within our vibrant towns, villages and hamlets. This document outlines our proposed tourism strategy.

Our ambition is to become the leading, year-round tourism destination in Devon, whose diverse ecosystem of outstanding natural environments, distinctive, high-quality businesses, set within towns and villages, all thrive and grow through a commitment to Net Zero, accessibility and collaboration.

We have aligned our strategy to our priority goals of carbon reduction and working in partnership with others and, in recognition of the strength of our private sector and local business, believe that the Council should act as an enabler to the sector, addressing gaps in the market and working to support sector development.

To achieve our vision, we have set ourselves six ambitious, but achievable objectives linked to growth, fostering collaboration, Net Zero and improving accessibility.
We will be supporting the development of four core product themes.

- Natural diversity - the natural beauty and landscape of our area can attract visitors all year-round, decreasing our reliance on the traditional seaside high season offer.
- Food and drink - this theme has year-round appeal to those seeking an authentic ‘foodie’ experience and supports the positioning of ED as an area committed to high quality product and working sustainably towards Net Zero.
- Active nature – this proposition builds on the strengths of our natural environment but needs further curation to improve accessibility for the visitor and to ensure that activities such as cycling, walking and watersports within the district are promoted responsibly to protect bio-diversity.
- Cultural tourism – Working in collaboration with the Cultural Strategy, this theme developed over the mid-term will serve to create a larger audience to explore the full range of cultural activity in the district. There is potential to create an art trail, with standout exhibitions with widespread appeal as well as supporting and coordinating the promotion of events which attract visitors to the area and take place in June/early July and September/October,

By focusing our resources on these areas, the district will have four pillars on which we can raise our profile, increase investment, attract both national and international visitors and maintain our reputation for quality whilst also supporting the sector to be more accessible to both visitors and residents and working collaboratively towards achieving Net Zero.

Councillor Nick Hookway

CONTEXT

Brief

East Devon wishes to create a shared 5-year vision and strategy for its tourism offer. The strategy needs to reflect the district's local unique character, take advantage of its key assets, its environmental capital and any opportunities aligned with cultural tourism. The work should be built on the core principles of sustainability, resilience, innovation, accessibility and inclusivity. It needs to align with the council's vision for a clean and greener future, with improved accessibility, good quality employment and higher wages across the area. It needs to be designed in partnership and collaboratively with our emerging District cultural development strategy. As per the brief, we have used existing strategies, extensive stakeholder engagement, national tourism trends, analysis and research to build an evidence based approach. The new mid-term strategy needs to be achievable but ambitious, compelling and identify a direction, interventions and role for East Devon District Council that will create lasting impact for the area's tourism sector.

East Devon Tourism Landscape

According to Visit England, Devon was the fourth most popular visitor destination in England in 2018. Before Covid, East Devon attracted an average 6.7m visitors a year, worth £352m to the local economy. The District enjoys the third highest number of visitors, behind Plymouth and Exeter cities, and the second highest expenditure behind Plymouth.[1] East Devon has a strong reputation for the quality of its natural environment with attractions such as the Jurassic Coast, East Devon and the Blackdown Hills AONB; its food and drink offer with local producers such as Lyme Bay Winery and September's Taste East Devon festival; its attractions such as Crealy Theme Park & Resort and Bicton Park Botanical Gardens and a wide range of accommodation from larger hotels such as the Victoria, the Devoncourt Hotel and Lympstone Manor to self-catering accommodation ranging from Holyford and Boswell Farm cottages to Ladram Bay Holiday Park and Cuckoo Down Farm Glamping. The whole area is regarded as being welcoming and friendly, and it attracts a predominantly UK visitor (over 95%)[2]. During the recent pandemic, the reputation of the county remained high. Though the local economy benefitted from the move to local holidays and staycations, it was strongly affected, like all tourism areas, by the economic shocks of the pandemic. Total tourism expenditure fell from the average £352m to just over £155.6m in 2020[2]. At the time of writing, figures for 2021 are not yet available, though anecdotally from the private sector engagement carried out as part of this strategy, most companies enjoyed a far more buoyant season in 2021, with some stating that 'we will never see another season like it'. However, it is clear that the past two years have been extremely challenging, which is of economic importance to the District, hence the need for this strategy to identify how to best support the recovery of the sector.

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[1] Source: VisitEngland – GBTS 3 yr averages 2017-19

[2] Source: *The Economic Impact of the East Devon Visitor Economy 2020 - The South West Research Company Ltd*

Economically, by far the more prevalent type of business employer in East Devon are those classed as micro-businesses, employing between 1-9 people, accounting for 77% of all business (4,305 overall), with many not meeting the VAT threshold level. Large businesses employing over 250 people account for less than 1% (just 10) in the area and of the top 25 businesses in East Devon, by number of employees, only two are recognised tourism businesses. Yet, in total, tourism businesses collectively still employ a significant number of people. The sector directly employs 2,479 people (1,692 FTE), indirectly 696 (expenditure by businesses in direct receipt of visitor expenditure on the purchase of goods and services for their businesses) and induced 262 (induced jobs are those that are supported by the spending of wages by employees in direct and indirect jobs). Therefore, overall the tourism sector employs an estimated 3,438 people (2,532 FTE equivalent).[3]

Skills and Employment

The employment structure of East Devon is more heavily concentrated on relatively low paying industries within the district than across Devon and England. This is due to the prominence of industries such as Wholesale and Retail, Accommodation & Food services. Part time employment in East Devon is also higher with 39% of employees employed on this basis compared to 38% in the Devon CC area and 32% across England. There is also a much greater proportion of Agricultural employment (like the rest of Devon) due to the rural nature of the country and local area. Tourism employment in East Devon is slightly lower than the Devon average, but both areas are significantly more reliant on tourism than the national English average.[4]

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[3] *Source: The Economic Impact of the East Devon Visitor Economy 2020 - The South West Research Company Ltd*

[4] Source: Devon County Council and Wavehill Social & Economic Research

Tourism - National data

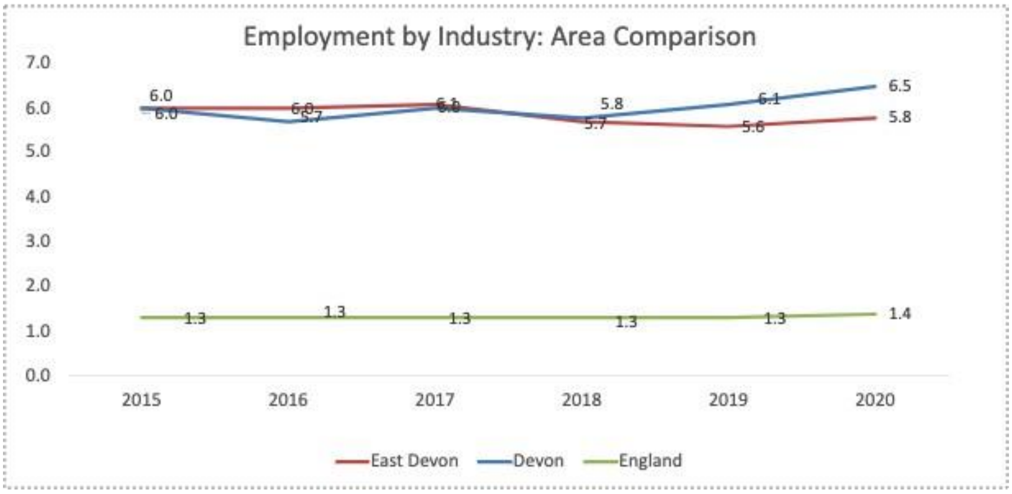


Figure 1: *Number and percentage of people in employment in single industry section by area over time*

The stakeholder engagement which informed this strategy reinforced that the current employment market, especially for hospitality, is very challenging, with widespread vacancies across the district. The challenges are complex; not only is there a shortage of skilled labour but additionally there are difficulties in accessing affordable accommodation for current and future employees, there is a lack of public transport to many tourism venues and generally there seems to be a reluctance to work in the sector due to its hours and conditions. Only the care sector has more vacancies than hospitality as the following table showing job adverts by occupation from Q1, 2022 identifies.[5]

[5] Source: Burning Glass Technologies, Labour Insights

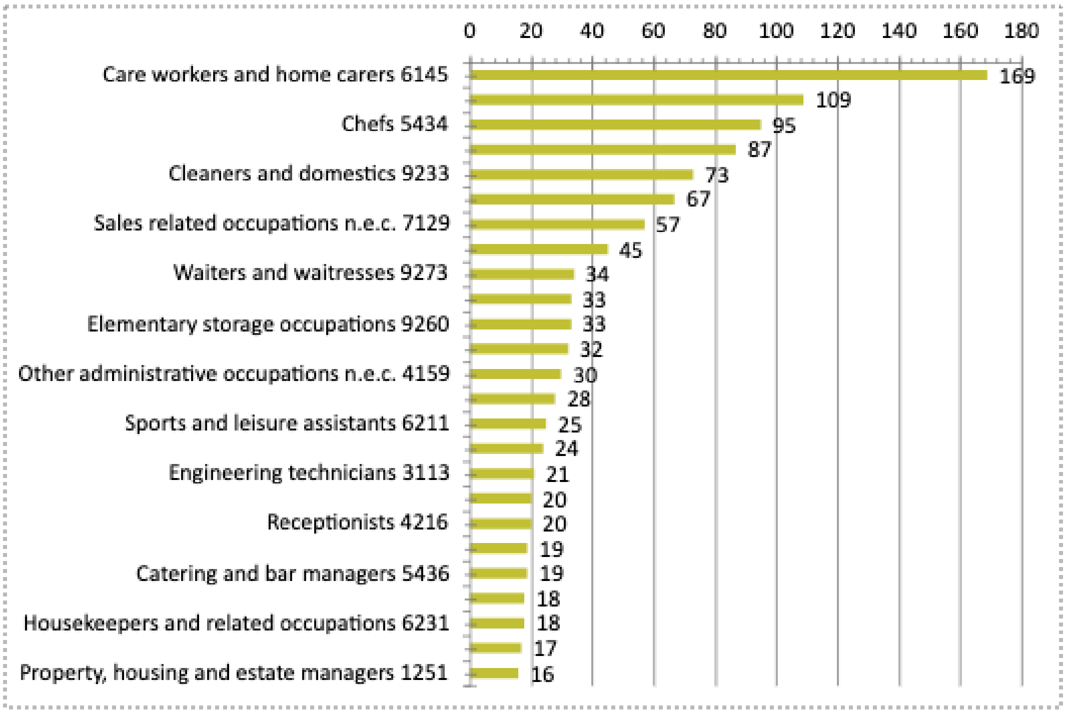


Figure 2: East Devon Job Adverts by Occupation Q1 2022

The challenges around skills and labour supply will not be easily remedied as a 2020 analysis of East Devon's age profile shows that there are lower proportions of 16-49 year olds within the job market than the average in either Devon or England.[6]

Competitor Destinations

As part of the research, we looked at destinations across England and their similarities to East Devon. Destinations were based on having both coastline and AONB areas. The data used is from Visit England's series of destination reports, which looks at the satisfaction and perceptions of destinations across England. Specific data for East Devon is unavailable and therefore County data for Devon is used for comparison purposes.

The analysis compared Devon to Dorset, Norfolk, Northumberland, Somerset and Suffolk. The full analysis can be found in the research data pack, attached as Appendix 1. However, based on the comparisons, Devon generally has good levels of loyalty, higher than all other comparator destinations. Moreover, there is a low level of people who have never been to Devon and are not likely to visit in the future. There is a loyal base of visitors who make repeat visits on a regular basis to Devon and those who have never been to Devon, but would like to in the future. In terms of satisfaction, Devon is rated lower than Northumberland and Somerset but

6 Source: Devon County Council and Wavehill Social & Economic Research

on a par with Dorset, Norfolk and Suffolk. Although we have already seen good, general levels of loyalty to Devon, the propensity to revisit is lower than four of its benchmark comparators, with only Dorset seeing similar levels of visitors likely to revisit.

	Devon	Dorset	Norfolk	Northumber land	Somerset	Suffolk
Satisfaction	46%	47%	47%	67%	57%	47%
Likelihood to revisit	8.1	8.1	8.4	9.0	8.7	8.3

Figure 3: Satisfaction an intention to revisit, Devon vs benchmark competitors

Across all the satisfaction scores, Devon was below or on a par with its comparators. The quality of the natural environment was the highest score across all attributes (80%), slightly above Dorset and Norfolk but below, Northumberland, Somerset and Suffolk. Respondents agreed that the top five images of Devon were coastal, rural areas, seaside, food and drink and for family. The benchmarking data reinforces the strength of the existing Devon brand.

Spatial Overview of East Devon's Tourism Economy

As indicated above, East Devon has a strong tourism offer spread across the area. 32% of visitor spend is attributable to the food and drink offer, 21% to accommodation, 20% to shopping and 11% to attractions and entertainment.[7] There are however spatial differences in how tourism and retail assets are deployed with higher vacancy rates on high streets in Axminster (18.1%) and Otter St Mary (12.5%) having a detrimental effect on the visitor experience. Exmouth's vacancy rate is relatively high at 10.4% but has been worse in previous years.

Appendix 2 is EDDC's rates database of accommodation and attractions across the county and Appendix 3 maps these assets visually to show where there are gaps and opportunities for new offers. The mapping shows that the provision of serviced accommodation is good, though there may be some potential for a small offer in East Devon AONB, if proposed in a way that is sympathetic to the natural environment. The self-catering provision is strong across the district with an even spread across the area. There is a concentration of caravan and camping sites located in coastal areas, with some potential to increase the offer for inland areas, though sufficient future visitor demand would need to be evidenced through further research. There is an even spread of attractions and places to visit across both coastal and inland locations. There is potential to encourage further attractions to the east of the district, around the Blackdown Hills AONB and Axminster on the Dorset border,

[7] *Source: The Economic Impact of the East Devon Visitor Economy 2020 - The South West Research Company Ltd*

helping stimulate the tourism offering in this area and complement the draw of River Cottage HQ.

The tourism strategy has been developed in collaboration with the East Devon cultural strategy. This piece of work identified that 41% of cultural assets are venues and other organisations, which includes visual and performing arts, make up 21% of cultural assets. The cultural strategy identified that the District has a strong, network of smaller cultural assets, some of which have the potential to be developed further to attract visitors, as do some of the 15 festivals identified during the process of the cultural strategy development.

Image: Eastdevonly.co.uk

Wider UK Landscape

KPMG's June 2022 Outlook forecasted that a deterioration in the global economy (linked to the war in Ukraine, renewed lockdowns in China putting upward pressure on commodity prices and continued supply chain issues) coupled with a fall in consumer spending in the UK, could push the UK economy into a mild recession in 2023. This fall in consumer spending is being driven by the current cost of living crisis and the rising personal tax burden – though this may be affected by who is elected as the new Prime Minister in 2022. Additionally, businesses themselves are facing significant challenges such as rising material and staffing costs, as well as the labour shortages highlighted above. Our stakeholder engagement confirmed that the current trading conditions for the tourism sector are challenging, with some accommodation providers indicating that they had vacancies in July and August for the first time in many years.

However, current consumer sentiment is not completely negative with many visitors feeling ready to have a holiday. Per GWI's[8] latest consumer poll, 67% of consumers state that inflation has had a moderate or dramatic impact on them. However, those who can afford to treat themselves are continuing to do so, and while consumers are saying they may spend less on holidays, they are not prepared to give them up altogether, having survived the lockdowns and restrictions of the pandemic. The Visit England Covid Tracker echoes this trend, finding in its survey for June 2022, that 76% of people were feeling OK but cautious, or comfortable with their finances.

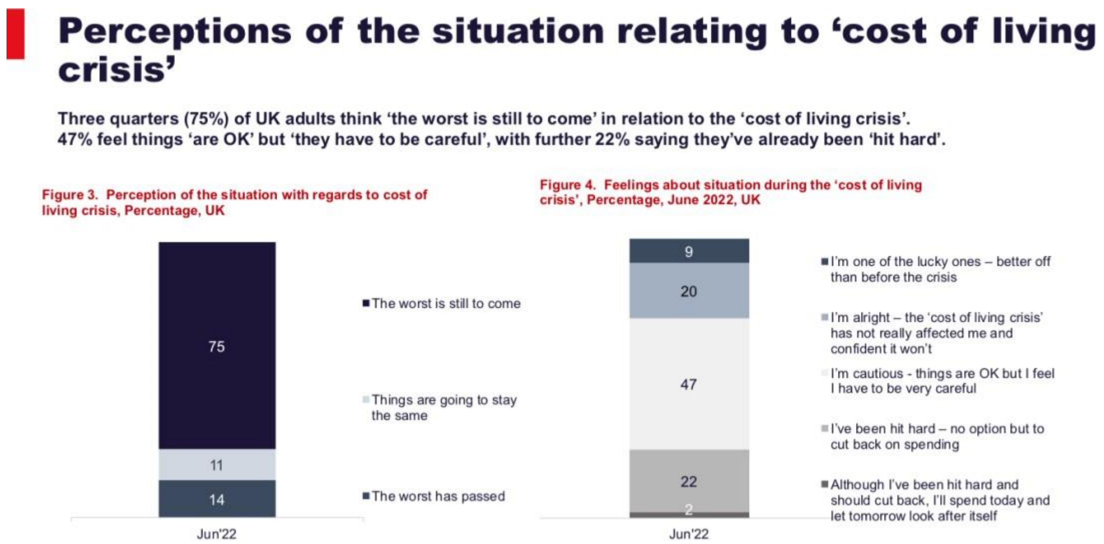


Figure 4: Visit England Covid Tracker , June 2022, perceptions re cost of living crisis

Encouragingly, 39% more UK consumers are likely to take a UK holiday than before the pandemic citing ease of organisation and airport difficulties as key drivers.

[8] https://www.gwi.com/consumer-dilemma

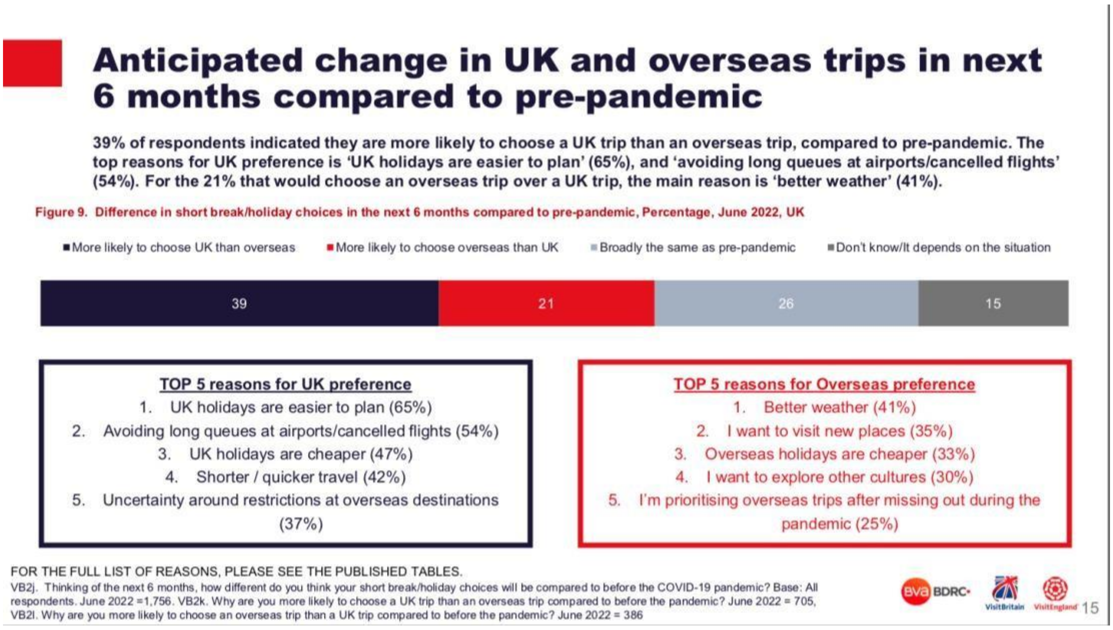


Figure 5: Visit England Covid Tracker, June 2022, changes in consumer buying habits

This bodes well for East Devon, which has a strong tourism offer with its range of high quality, diverse and unique attractions and outstanding natural beauty and countryside. It shows that there is demand, if the district can promote itself effectively and convincingly. Furthermore, a 2020 report commissioned by the Heart of the SW LEP[9], identified that for Devon there was an opportunity to build a more resilient sector by leveraging the trends for authentic tourism experiences, sustainability and accessible tourism and by building the out of season offer.

Promotional Landscape

In 2019, the Tourism Sector Deal[10] was announced which was followed up in 2020 by Visit England and Visit Britain's tourism strategy. The deBois review[11] examined the complex DMO landscape and highlighted the fragmentation and complexity in Devon as being particularly confusing for the consumer. On July 20th 2022, the UK Government published its response to the de Bois review, recognizing the value of DMOs and committing £4m over three years to develop and pilot a new accreditation scheme.[12] Under this scheme, government will engage with DMOs who represent a

9 Building resilience in the heart of the south west visitor economy, National Coastal Tourism Academy

10 https://www.gov.uk/government/publications/tourism-sector-deal

11 https://www.gov.uk/government/publications/independent-review-of-destination-management-organisations-dmos

12 https://www.gov.uk/government/publications/government-response-to-the-independent-review-of-destination-management-organisations-in-england/government-response-to-the-independent-review-of-destination-management-organisations-in-england

large enough geographical area e.g. county, city or region. It is unlikely that DMOs for towns or districts will be large enough to qualify. Nationally, DMOs will be renamed Local Visitor Economy Partnerships (LVEPs) and the pilot will develop a new tiered model with a larger, lead regional - 'hub', and a second tier of accredited DMOS at a county or city level - 'spokes'. The funding announced on the 20th July, will be in addition to the Visit England budget which, anecdotally, it is understood will be focused on growing inbound tourism.   As part of its response, national government confirmed that it will not act to resolve any fragmentation in the local DMO environment. To maximise the success of the new structure, DMOs will need to take a less territorial approach, have a greater focus on collaboration, and recognise that the current fragmentation is holding them back from acting as effective advocates for the visitor economy.

Across East Devon there are a range of promotional agencies covering different geographical footprints – county-wide, regional, town-based, special interest or sector based. Bar Visit Devon, these promotional agencies are likely to become 'third tier' organisations under the new accreditation scheme, with little interaction with central government. The profile and reach of the Visit Sidmouth site will become more geographically diverse across the district with the launch of additional town-based sites focusing on Ottery St Mary, Budleigh Salterton, Seaton and Honiton. The ambition of the Visit Sidmouth led project is to encourage visitors to travel more broadly across East Devon and to encourage sustainable and responsible tourism practices.[13]

A key deliverable for the East Devon tourism strategy is identifying how best to work with this wide range of promotional agencies operating within the area so that duplication is avoided and the profile of the area is raised and promoted in the most efficient route possible. The strategy will need to make clear how the unique profile and product offer of East Devon can be communicated to an increased range of existing and future audiences.

13 Coast meets Country Collaborative Tourism Funding Success - Sidmouth Town Council

Image: Eastdevonly.co.uk Paul Newman, Beer Beach

Methodology

Approach

There were six key areas of focus that were explored and reviewed to create the strategy to help East Devon raise its profile and deliver increased economic benefits. These areas were:

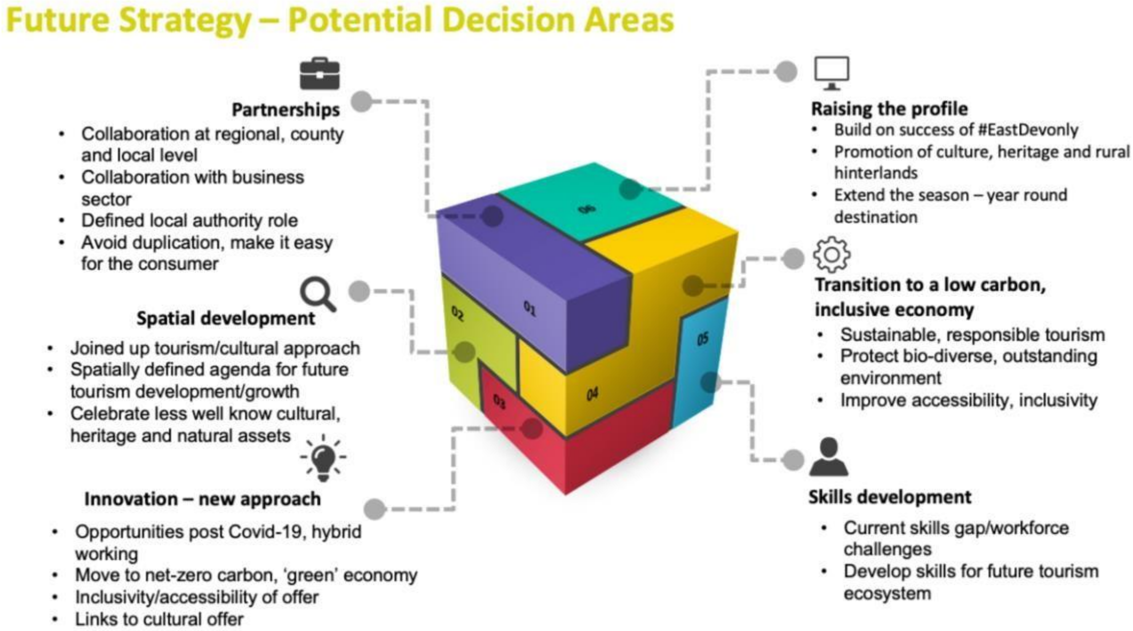
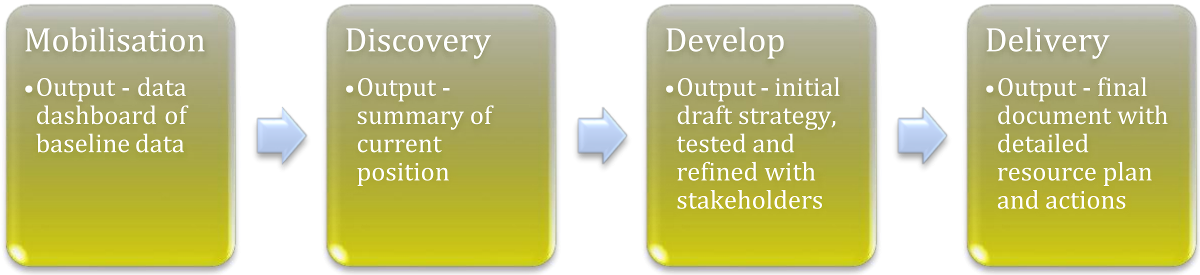


Figure 6: Decision areas

The project was broken down into four key phases to examine each of the areas above. At the end of each phase, the output indicated below acted as a building block to facilitate progress to the next phase of the strategy development.



Throughout the project, we used the following design principles to guide development and decision making for the strategy:

Figure 7: Design principles

Using the brief, for this tourism strategy, consultation with the East Devon team and the design principles above, we have produced the following success criteria, against which we can measure successful delivery of a robust and achievable vision for the East Devon tourism sector.

1. Short to medium term viability	Does the solution work to grow and develop the tourism sector in the short to medium term? Will it help the district create a more resilient sector and create an ambitious yet achievable vision for the area?
2. Clarity of roles	Does the strategy clearly identify the role of EDDC and help provide clarity as to who does what within the tourism economy of East Devon. Is the proposed model of delivery based on partnerships and collaborations, guided by a joined-up agenda that encourages innovation and development?
3. Alignment with cultural strategy	Does the solution build on and align with the emerging cultural development strategy? Is there synergy between the two pieces of work? Are they achievable?
4. Responsible and sustainable	Is the strategy sustainable? Will it underpin EDDC's aim of achieving net zero carbon by 2040? Will the strategy identify how tourism can support and develop the local natural capital and biodiversity and new regional assets, working across the district as a whole?
5. Accessible and inclusive	Does the strategy address how the area can improve its inclusivity and accessibility, sharing and stimulating best practice across the industry? Does it address how to leverage the growth potential within these two markets?
6. Overcome future challenges	Does the strategy identify the main challenges to sector growth and how EDDC can work in collaboration to address these risks, sharing innovation and best practice across the sector?
7. Achievable growth	Does the strategy outline and provide a direction on how to achieve future growth for the sector?

Figure 8: Success criteria

Data Sources

We used a variety of sources to inform the strategy and understand the current strengths of the regional offer. Nationally we accessed Visit England's latest consumer perception and tourism trends data as well as the large data sets provided by the ONS. We added to this by working with Devon County Council's Economy, Enterprise and Skills team to understand trends in employment and skills, the area's business landscape and high street vacancy rates. In addition, the data set in Appendix 1 references the local tourism data for 2020, commissioned by East Devon District Council's Economic Development team. Our approach was to use local level data wherever possible but, when this was unavailable, we applied tourism trends to national level data.

In addition to desk-based research we used qualitative feedback from a two-phase programme of workshops and stakeholder meetings to both formulate and challenge a draft strategy framework. The list of stakeholders we engaged with is as follows:

View from the hill

District Council Staff

Cllr Nick Hookway
Cllr Paul Hayward
Geri Panteva
Rob Murray
Andy Wood
Catherine Causeley
Alison Hayward
Andrew Hancock
Simon Bates
Rory Chanter

County Council Staff

Jamie Evans
Nicholas Child – Skills

Private Sector

Exeter Airport
Higher Wiscombe Cottages
Crealy Theme Park
Darts Farm
Ladram Bay Holiday Park
The Pig at Combe
Two Drifters Distillery
The Donkey Sanctuary
Otter Brewery
Dalwood Vineyard
Killerton House
Edge Watersports
Alpine Park Cottages
Andrewshayes Holiday Park
Heron Farm
Glebe House
Sidmouth Hotels
Deer Park
Mazzard Farm
Seaton Tramway
Lympstone Manor
River Cottage HQ
LED Leisure - Ocean

Promotional Agencies

Visit Devon
Visit Sidmouth
Visit South Devon
Food and Drink Devon
Jurassic Coast Trust

Other

East Devon AONB
Blackdown Hills AONB

Hollie Smith-Charles – FEI
(lead for Cultural Strategy)

Visit England

Services 4 Tourism

Market Review

The team has used multiple sources to produce the market review included as appendix 1.

Findings

We used the above research, context and stakeholder engagement to produce a SWOT of East Devon's tourism offering. This is outlined below:

STRENGTHS	WEAKNESSES
• Variety and beauty of landscape • Diversity of offer- see, do, stay • Quality and private sector investment in tourism offering • Food and drink offer • Jurassic Coastline • Transport to the region - rail/road/air • Sustainable practices	• Recruitment/staffing - complex issue with many facets • Demographic – weak labour supply of future, younger staff • Transport within East Devon • Diversity of promotional sites • Seasonality - too reliant on high season
OPPORTUNITIES	**THREATS**
• More collaboration • Increased promotion of food ecosystem • Activities linked to natural environment, bio-diversity/curated trails • Tourism trend for authentic experiences, green & accessible tourism • Quality of product offering	• Current economic downturn - reduced disposable household income • Competition from abroad, Covid carry-over • Rise in costs (business and raw materials)– impacting profitability • Political uncertainty

East Devon District Council

SWOT

The SWOT was tested with stakeholders and refined to fully reflect the views of both the private and public sectors.

Strengths

Key strengths identified included:

- Breadth and scope of the landscape – from sea to countryside, including as a standalone feature the world heritage Jurassic Coast
- The diversity of offer - East Devon has a wide range of unique, high quality businesses and visitors enjoy a broad choice of places to stay, things to do and places to eat. The quality and breadth of the offer were highlighted as two key distinct strengths
- The breadth of food and drink was recognised as an existing strong offer, in terms of producers, vendors and hospitality offerings. This strength, if developed further could align with the growth in demand for authentic experiences.
- There is already notable, widespread adoption of sustainable practices across the sector. The businesses concerned believe that this is the right thing to do and this depth of practice could align to the growth in demand for eco-friendly tourism or 'green' tourism.

Weaknesses

- Transport was deemed to be both a strength and a weakness. It was acknowledged that there were good links to the area from the UK but that once within the district, public transport was deemed to be poor and unreliable for both visitors and residents.
- It was acknowledged that there was a lack of EV charging points, making it difficult for anyone who has invested in an electric car to reliably recharge within the area. It was felt that the district was behind other areas in the UK in this regard, and needed to act in the short term.
- The key weakness for the sector is skills and a lack of labour. As highlighted in the context section, this is a fundamental issue which may impede sector growth if no action is taken.
- Further weaknesses included the breadth of promotional sites. It was felt that ideally there would just be one site, but acknowledged that this was not feasible as there were many parties hosting sites and the council has no control or ability to restrict these offers.
- The last weakness was an acknowledgement that the sector was too reliant on the high season. If, through the strategy, it was possible to develop and promote year-round business this would facilitate sustainable growth for the whole sector.

Threats

- The largest longer term threats were linked to the state of the wider economy, cost pressures on consumers and companies alike, as well as the current political uncertainty.
- It was also acknowledged that there was increasing competition from other UK destinations, as well as international destinations which, at times, are cheaper than East Devon's offerings.

Areas of Opportunity

Based on analysis of the SWOT and the Discovery Phase, there appears to be strong potential to:

- Build and foster a collaborative network to support regional growth, employment and prosperity. With new assets, such as the Clyst Valley Regional Park, the Science Park and the Seaton Cycle Link coming on stream, there is real potential to work in partnership to drive visitor expenditure and numbers.
- Leverage the strengths East Devon has in its environment, coastal assets and bio-diversity to underpin any future product offerings. This is the core, fundamental strength of the district; it therefore needs to be at the centre of all future product development.
- Create stronger, product/themed propositions that align with macro trends for authentic experiences such as well-being, accessibility and green tourism. All products will need to be developed so that they are suitable for both national and international audiences to drive growth over both the mid and longer term.
- Support and encourage the continued development and investment in high quality product from the private sector, to create a strong positioning for the District and to counter increased national and international competition.
- Leverage and build on the widespread strengths in sustainability and Net Zero in both the tourism sector and the wider economy to reposition the District, attracting visitors and investment.
- Encourage the use of the themed propositions across the myriad of local promotional websites. By repeating the same proposition across many websites, it will make it easier for the consumer to recognise, book and access the district's offer.
- Use the new themed propositions to foster a year-round offer and encourage wider geographical spread throughout East Devon.
- Leverage the natural assets to suggest 'affordable', activity based/well-being propositions, to encourage visitors to visit the area during difficult economic times.

Image: Eastdevonly.co.uk

Vision

To leverage the strengths of the East Devon tourism offer and maximise the potential of the future opportunities identified by the strategy, we are proposing that East Devon District Council adopts the following vision statement.

Our vision is for East Devon to be the leading, year-round tourism destination in Devon, whose diverse ecosystem of outstanding natural environments, distinctive, high-quality businesses, towns and villages, all thrive and grow through a commitment to Net Zero, accessibility and collaboration.

The vision statement is ambitious but achievable, reflecting the district's local unique character and aligning with the Council Plan[14] vision for a clean and greener future, with improved accessibility, good quality employment and wages across the area. The vision builds on the quality of the existing tourism offer and encourages growth through a commitment to quality, sustainability and inclusivity. The vision also reflects the breadth of the tourism sector, acknowledging the connectivity between direct expenditure and employment, supply chains, and induced jobs. The statement has been set at a Devon geographical area as we believe this should be attainable in a five-year timeframe. Longer term, both the council and the private sector would like to achieve a leadership position across the South West, but further work will be needed to build the foundations before this larger goal can be achieved.

14 Council Plan 2021-23 | East Devon District Council

Values

We are proposing that the following values are adopted by the council and its partners to aid implementation of the strategic vision.

Sustainable and accessible

- We will embed a focus on sustainability, 'green' best practice and accessibility across the sector, linking policy, planning and support for businesses

Collaborative

- We will make it easier for customers to access our offer, build the district's reputation, share best practice and create new opportunities for innovation by working in partnership and fostering collaboration with all partners.

Preserving and connecting with nature

- We will ensure that we protect the natural capital of our outstanding environment and its biodiversity, sympathetically leveraging its assets to grow the sector and its economic contribution.

Inclusivity

- We will support tourism, from the countryside to the coast, enabling the whole district area to thrive and prosper.

Strategic Framework

To implement the strategy, we propose that the following strategic framework is adopted across East Devon by District Council.

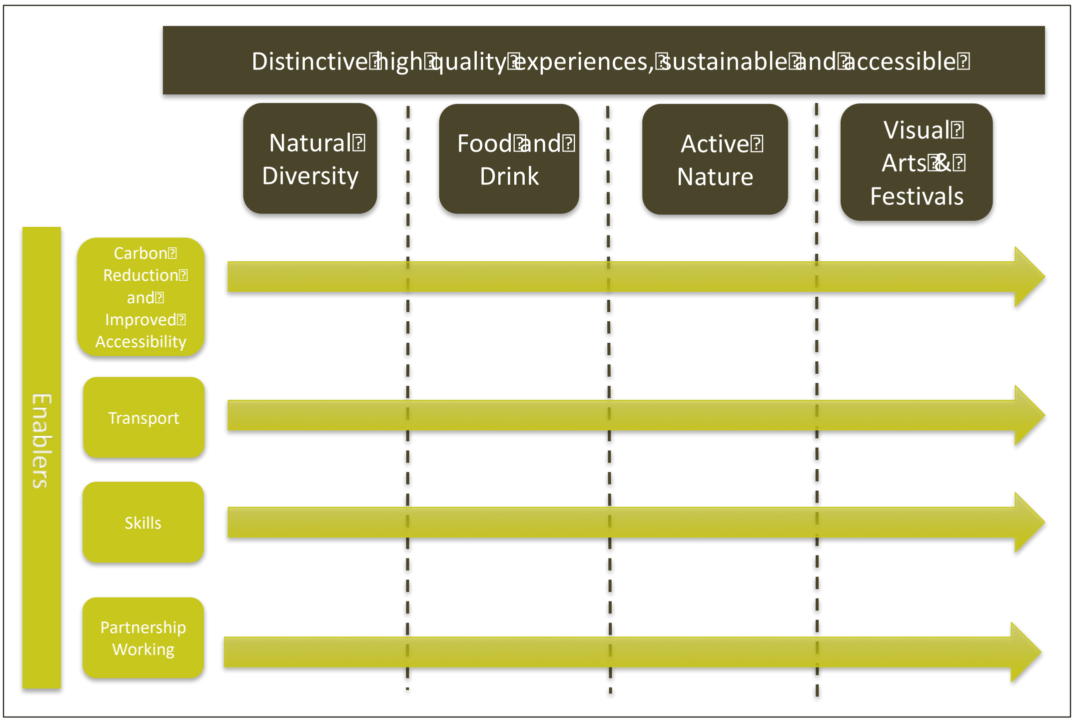


Figure 9: Strategic framework

Building on the findings of the SWOT, we suggest that four core themes are developed as product propositions. These four themes are natural diversity, food and drink, active nature and visual arts and festivals. By focusing resources on these areas, the district will have four pillars on which they can curate high quality propositions suitable for both national and international audiences, promote the area, raise its profile and facilitate visitor expenditure across the region. Underpinning these products will be four enabling disciplines i.e. four cross-cutting areas of policy, resource and investment which will underpin and support the four promotional themes.

Natural diversity
This is an existing strength and needs little product development.

- It was highlighted by all stakeholders and acknowledged as the main reason why customers already visit the area in such numbers.
- There is already a good understanding within the private sector of what the district has to offer, ranging from inland highlights such as the AONBs to the beauty of the Jurassic Coast and seaside areas.
- Going forward, there is an opportunity to highlight areas which are less well known, building on the work of the 2021/2 #EastDevonly campaign and ensuring these areas are promoted as part of the work to develop the new town sites being funded by the Innovation and Resilience Fund.
- The natural beauty and landscape can attract visitors all year-round – coastal/inland walking, nature reserves, peace and tranquility in addition to the traditional seaside high season offer.

Food and drink
This is an existing strength but would benefit from some further work to reinforce the existing proposition

- There is a strong range of ethical, sustainable, superb quality produce, food and drink providers. A rich, multi-layered offer, providing a great deal of choice for national and international visitors with an interest in food and drink. As one stakeholder noted, East Devon is a world-class larder with associated hospitality expertise.
- Promotion of the theme supports the positioning of East Devon as an area committed to high quality produce and working sustainably towards Net Zero.
- The theme has year-round appeal to those seeking an authentic ‘foodie’ experience and visitors who are environmentally conscious.

Active nature
This is an existing strength, arising from the range of attractions and the natural environment, but needs further curation to improve accessibility for the visitor and to ensure that cycling, walking and watersports activities within the district are promoted responsibly to protect bio-diversity.

- The current offer would be strengthened by the co-ordination and production of more walking trails and linked biking trails. With the advent of e-bikes, the trend for well-being and digital detox, there is potential to grow the audience who would enjoy biking across the whole East Devon area – from the hills of the 2 x AONBs, to in and around the coastal towns and wetlands of Seaton and up the Exe estuary to the Clyst valley.

- By linking and packaging trails, it would encourage greater exploration of both the coastal and inland areas.
- The activity theme appeals to all ages and builds on the existing strong water sports offer, driven by the private sector.
- If curated well, the routes can provide links to local 'gems' such as cafes, artisan crafts, developing cultural offers and generally disperse expenditure across the whole district area.
- A well curated product suite would be suitable for driving traffic in the shoulder seasons supporting the vision of a year-round destination.

Culture Related Propositions

The work streams of the new Cultural Strategy for East Devon will establish new cultural products, partnerships and promotional activity to grow the creative and visitor economies. There is scope for the new proposed cultural producer role and the wider ACED network to support 'product development' in this sector so that stronger cultural offers are evolved, which serve to 'attract' visitors to East Devon. It is anticipated that the investment and focus for this core theme will need to be developed over the mid-term, with any work linked to product development and promotion being led by the cultural producer and cultural compact. The goal of this core theme is to attract a larger audience to explore the full range of cultural activity in the district.

Visual arts

- Currently there is an embryonic offer, including a good network of local galleries.
- By investing in visual arts, via Thelma Hulbert Gallery, Killerton House and Ocean, along with a map showing the range of private sector galleries, there is potential to create an art trail, with standout exhibitions with international appeal.
- It is anticipated this new product could attract visitors in the shoulder and low season, growing the 'culture vulture' audience segment.

Festivals

- East Devon has over 15 festivals/year, including flagship summer events such the Sidmouth Folk Festival and Beautiful days.
- By supporting and coordinating the promotion of medium-sized events which have strong enough content to attract visitors to the area and take place in June/early July and September/October, there is potential to grow shoulder season trade.

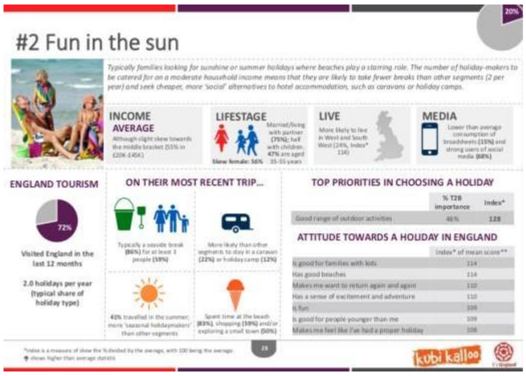
Image: Eastdevonly.co.uk

Target Markets

To help identify who would be the most appropriate target market for East Devon, we have used the Visit England customer segment work. This work was based on the hypothesis that different people want different things from their domestic holiday or short-break destinations. To produce distinct customer segments, they considered:

- What people do (activities/places)
- Who the traveller is (demographics)
- Motivations and needs

By combining these lenses, they have produced consumer segmentation for the tourism industry that is robust as it explains different behaviours. It is useful as it allows companies or regions to directly find and target their audience and meaningful, as it isolates different product-based motivations/needs. The full research is attached as Appendix 4, as background data. However, using this research, we can identify the most appropriate target market for each of our product themes as set out below.



Theme

Natural Diversity
Food and Drink
Active Nature
Visual Arts and Festivals

Theme

Natural Diversity
Active Nature

Theme

Visual Arts and Festivals

Theme

Natural Diversity
Food and Drink
Active Nature
Visual Arts and Festivals

As is illustrated, each of our proposed product themes will be attractive to either Country-loving Traditionalists, Fun in the Sun, Free and Easy Mini-breakers or Aspirational Family Fun target segments. The two largest target markets and areas of opportunity, are older couples (Country-loving Traditionalists) and wealthier families (Aspirational Family Fun).

Strategic Objectives

We will measure how successfully we are implementing the tourism strategy using the following objectives:

1. **A modest increase in the volume of visitors coming to East Devon.**
   For the last 'normal' trading period of 2017-19, the district achieved average visitor numbers of 6.7 m per annum. The first objective will be to support the tourism sector to recover after the economic shocks of 2020 so that visitor numbers reach 6.7 m in two years (by the end of 2024) and grow by 1% annually to reach 6.9 m visitors per year by the end of the strategy (2027).

2. **Increase the value of those visitors coming to East Devon.**
   For the same 'normal' trading period, the district achieved average visitor spend per head of £53 per person. The strategy will target growing the value of each visitor who comes to the District. In recognition of this year's rising inflation at 5-9%, we will target average spend per head at £56 by the end of 2022 (a 5% increase), rising by 3% per year to £63/head by year 5.

   If achieved, objectives 1 and 2 will grow the average annual revenue for tourism to £432 m by the end of 2027, i.e. 23% growth over 5 years.

3. **Curate and develop 4 product propositions/themes.**
   We will identify and develop the 4 core themes outlined in the strategy as four product propositions: Natural Diversity, Food and Drink, Active Nature and Visual Arts and Festivals. These core themes are aimed at developing a year-round tourism offer and growing the numbers of visitors in low season. The support of these product propositions will also provide content in the longer term, to promote the district internationally.

4. **Actively support tourism businesses to reduce carbon usage and improve accessibility.**
   This objective builds on the activity of the Innovation and Resilience Fund project, led by Visit Sidmouth, which aims to empower a minimum of 10 business to become Green Champions, providing training, mentoring and structural support to decrease carbon footprint and other environmental goals. From 2023 onwards, when this project finishes, we will build on these learnings and implement a new Sustainable Tourism Fund to actively support the tourism sector to commit to Net Zero carbon reduction and improve accessibility practices.

5. **Build a sustainable, collaborative, private sector network.**

   The council will foster collaboration by supporting the development of an East Devon Tourism Network based on the shared values of quality, Net Zero, improving accessibility and collaboration. These guiding principles are at the heart of our strategic vision. Facilitating partnership working will maximise the potential of the area and provide a platform for the development of the core themes as well as providing industry feedback on challenges such as skills, investment and transport.

6. **Embed the tourism strategy into the wider local policy context**
   To ensure effective implementation of the strategy's strategic vision, we will embed and link the tourism strategy across wider policy areas. For example, we will seek to include the strategy research as part of the evidence base for the emerging Local Plan and ensure that the key principles of the tourism strategy are reflected within the Plan's Sustainable Tourism Policy. We will work with colleagues across the council to ensure the tourism strategy vision is supported and influences other policy areas where relevant.

To monitor progress against these objectives, EDDC will commit to procuring annual tourism economic impact data to quantify the value and volume of visitor numbers and to track relevant growth.

The Role of East Devon District Council

The tourism sector has many different stakeholders, working in five different areas of the economy as is illustrated in the diagram below. As part of the strategy, there has been strong feedback to provide greater clarity on the future role of East Devon District Council.

The Tourism Economy

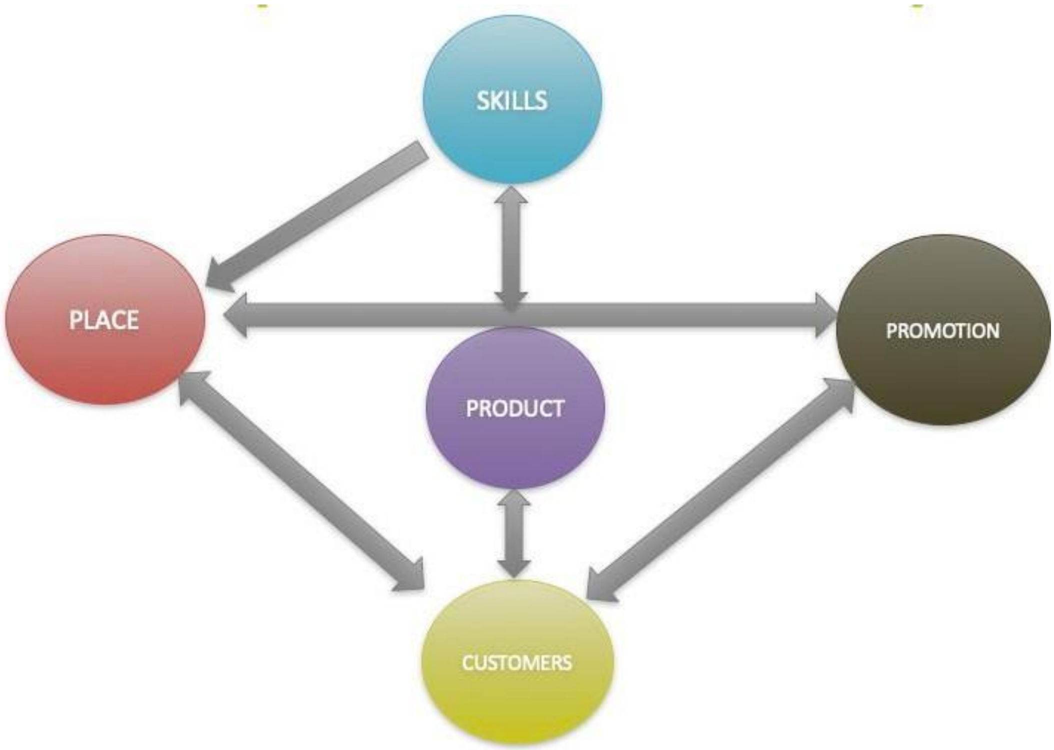


Figure 10: Visual representation of the dynamics of the tourism industry

In the development of this strategy, three options were considered for the council:

'Hands Off'	Continue existing place based regeneration focus including through use of council assets (e.g. Sideshore Watersports Centre in Exmouth) to support tourism, market driven. Positives – resources and funding could be allocated to other work streams. Negatives – if the sector is not supported following the recent economic shocks, there is a danger this would impact growth potential, jobs and economic resilience. Tourism is one of the top five sectors for the district, so 'hands off' would also provide few avenues to support Net Zero and reduce carbon emissions in the sector.
Enabler	The Council could facilitate growth, drive policy and change byworking with third parties and 'behind the scene'. This does not preclude the continuation of place based tourism regeneration activities utilising council owned assets. Positives – resources and funding could be targeted to areas currently not supported by other parties and they could drive strategic change via policy commitments. Negatives – as an enabler, there would be limited control for

the Council. An enabler model is reliant on other parties and is based on partnership working and collaboration.

Commissioner

EDDC would take an active lead in the promotion of the area
Positives – the council would have greater control over the programme of work.
Negatives – it is questionable whether EDDC has the resources and skills to lead all work strands effectively. Furthermore, there are already competent providers in key parts of the economy therefore there seems to be no real need for the council to take on a commissioner role across the board. This would be the most expensive option and it is doubtful that sufficient funding would be available.

Based on this analysis and the extensive stakeholder engagement, the strategy proposes that EDDC takes on the role of **Enabler**; filling gaps in the market and leading policy to facilitate change. To fulfil this role, mindful of current financial pressures, it is recommended that part-time existing officer resource is deployed within the Growth, Prosperity and Development team to work with partners to fulfil the tourism strategy's vision.

The Enabler Role

To illustrate how this role can be implemented, we have examined each of the five pillars that make up the tourism economy.

PLACE

Transport is a key tenant of place and the future prioritisation of public spending on strategic, public and sustainable transport will be determined by the proposed Devon, Combined Local Authority. As part of any future County Deal, EDDC, in its role as enabler, will have limited ability to lobby for district specific measures as one of the 8 Districts. However, poor inter-regional transport provision is a county wide issue, therefore there should be a lot of support for better joining up of public transport within districts to access tourism sites and general improvements in major access roads/rail to the County. In relation to accessing East Devon internationally, EDDC is working in partnership with Devon County and Exeter City councils, to support and facilitate the development of Exeter Airport as a sustainable aviation test flight hub at the heart of a wider research and development corridor.

Regarding Net Zero and place, EDDC will lead district policy direction as it seeks to achieve a green economic recovery. Recent developments at the Exeter and East Devon Enterprise Zone and the first electric commuter flight from Exeter Airport clearly epitomize the districts' ambitions to strive for sustainable economic growth. Elsewhere EDDC used its assets to enable delivery of the Sideshore Watersports Centre in Exmouth, an exemplar of highly sustainable tourism development. Within this policy context, the tourism sector can be encouraged and supported to extend the season, maximise the potential for green energy initiatives, reduce waste, increase recycling and implement measures to increase bio-diversity.

Work on the Local Nature Recovery strategy will begin in the Autumn, with Devon County providing the lead. But they will work in partnership with East Devon as they are responsible for the Local Plan, affecting spatial development, encouraging bio-diversity net gain, wider policy and implementation.

The Council's own land and property assets can continue to be utilised to enable tourism focused place-making activities across the district. These can include new seafront and town centre place-making projects aimed at delivering new facilities or public realm and event space for visitors and local residents.

The Council will also continue its regeneration activity in relation to the Clyst Valley Regional Park, and place based development initiatives such as the completion of the Stop Line Cycle Way in the Axe Valley being led by the County Council.

In the context of front line delivery, East Devon's Street Scene team will continue to be responsible for direct delivery. This team underpins delivery of the council's wider objectives by maintaining the 'shop window' of the district i.e. beaches, parks, some car parks, toilets and improved accessibility to public spaces via initiatives such as the Beach Amenity Plan.

SKILLS

Devon County Council will lead the policy for skills, as is evidenced by their recent acquisition of the former Flybe Training Academy and its conversion to a Future Skills Centre. Central government lead national initiatives such as apprenticeships which are implemented via the County. However, there are opportunities for local action via the future County Deal which sets out a commitment to implement a pilot to improve tourism recruitment within the county as a whole.

As part of the new framework, EDDC will act as facilitator, engaging with tourism businesses to ensure their challenges inform delivery of the County Deal skills commitments. If East Devon can evidence a strong, collaborative private/public sector working relationship, then they will be well positioned to make representations, test and inform any pilot programmes. EDDC will also be able to use the network forum to share new funding opportunities and any future skills programmes to ensure the sector is up to date with the latest initiatives to resolve the current skills shortages.

PRODUCT

As an enabler, EDDC will facilitate product development in three ways:

1. Firstly, they will support the creation of a new network of tourism businesses, committed to quality, Net Zero, improving accessibility and collaboration. The goal of this network will be to share best practice, encourage partnership working and provide a centralised hub to house information about cultural activities taking place across the region. EDDC will set out a brief and procure a third party organisation to run the network. A Memorandum Of Understanding will underpin the network's purpose, membership and focus to ensure consistent values, aims, criteria and direction. EDDC will not be engaged directly in the day to day operations of the network. By having a centralised 'What's On' cultural hub, any tourism business will be able to access this information and use cultural events to help them enhance their offer and drive footfall to their venues/eateries/attractions throughout the year.

2. Secondly, the council will facilitate product development. Visit England have reinforced the need for areas to provide well curated, bookable product which makes it easier for both national and international consumers to reserve packages and activities as they pre-plan their visits and stays. The new cultural producer and ACED will work in partnership with the network to curate and develop the festivals and visual arts themes. The Growth, Development and Prosperity team in EDDC will also work with the network to commission the curation and linking up of local assets to produce bookable product based on the Active Nature theme e.g. bike trails and walking trails.
3. Thirdly EDDC will work in partnership with the network to refresh any marketing tools originally created for the #Eastdevonly campaign, if they are deemed appropriate for promoting the core themes of Natural Diversity, Food and Drink or Active Nature.

Regarding delivery, as highlighted above, EDDC will continue to fund the Street Scene team and AONB teams which provide stewardship of the public spaces that visitors enjoy.

PROMOTION

EDDC will not actively participate in promotional activity. As an enabler, they have already funded a substantial investment in the development of assets to promote the towns of Ottery St Mary, Budleigh Salterton, Honiton and Seaton via the Visit Sidmouth Innovation and Resilience project. Going forward, they will leave the promotion of the area to 3rd party organisations, recognising that Visit Devon plays an important role as the key conduit to Visit England funding and the main agency concerned with international promotion. In the short term, funds will be allocated to facilitating product development (see point 2 above) so that local propositions are of both a national and international standard.

EDDC will provide further indirect support by potentially refreshing #EastDevonly marketing tools to support the core themes itemised in point 3 above. Where possible, these tools will be available to both the private sector and the range of promotional agencies to help them generate traffic and business to their sites and members and ultimately, driving increased numbers of visitors to the area.

CUSTOMERS

EDDC will have no direct engagement with visitors to the area other than end customers using the public assets stewarded by the street scene team and countryside and seaside areas that are managed by the AONB or owned by the council.

Funding

To support the tourism framework above and activities outlined as part of EDDC's enabler role, the council will be able to explore and draw down on the following funding streams.

UK Shared Prosperity Fund (UKSPF)
A proposed funding allocation of £210k to support sustainable tourism and £95k to deliver an East Devon Culture Programme over the next three years were approved by Cabinet on July 13th. If the Council's UKSPF Investment Plan is approved by Government (The Department of Levelling Up, Housing and Communities), these monies will be deployed for tactical, business level interventions for the tourism sector regarding sustainability, improved accessibility, network and product development, marketing tool development and to deliver the opportunities presented within EDDC's Culture Strategy.

Innovation Funds (both as part of Shared Prosperity Fund and possibly other national streams) can be applied for to support Zero carbon schemes and other schemes that may arise through greater partnership working.

Arts Council England announce rounds of funding regularly, therefore there should be future opportunities to fund either capital works or programmes to support development of cultural tourism products.

County Deal
The County Deal is currently being progressed by Devon County Council and partners. Current proposals include recommendations to fund:

- A pilot to improve tourism recruitment within the County and looking at new initiatives to develop future skills for the hospitality and tourism sector
- Improvements in transport links and infrastructure.

The Council may also consider:

- Use and management of existing assets
- Acquisition of assets for District wide benefits
- Direct Development of facilities
- Strategic Partnerships and Joint Ventures with third parties

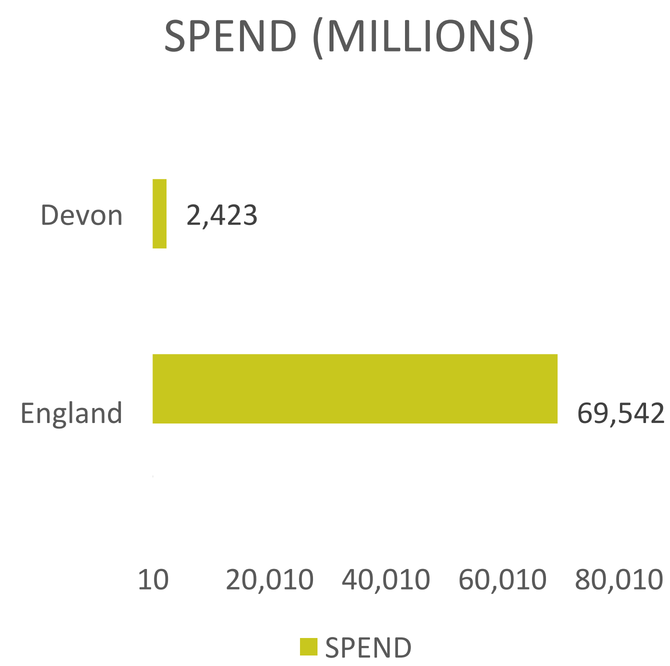
Appendix 1 - Research Data Pack

July 22

National Data

Tourism National data

TOTAL TOURISM (day Visits and all overnight combined



- Devon receives c48 million trips each year which equates to 3% of all visits made in England.
- In terms of expenditure, almost 4% of the total amount of spend across England, is spent in Devon itself.

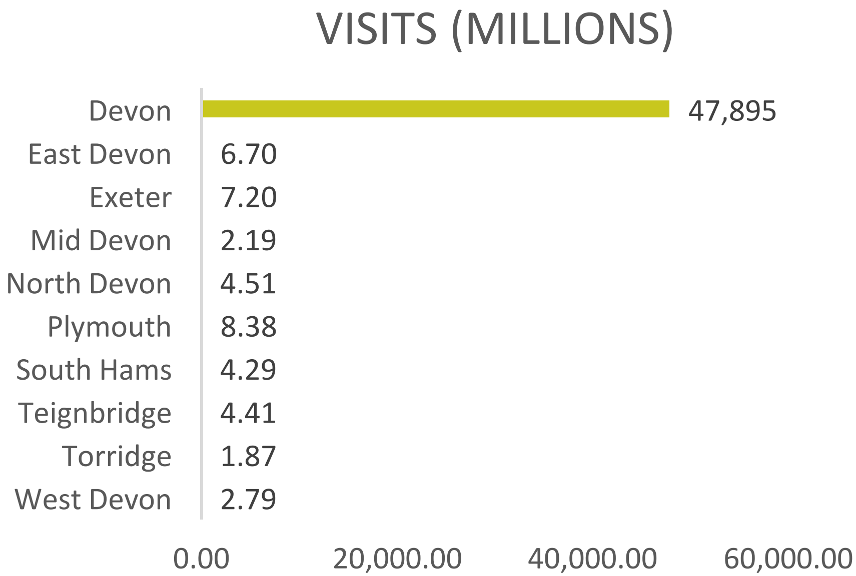
Source: VisitEngland – GBTS 3 year averages 2017-2019

Tourism National data

- When comparing Devon to other counties across England (including London), Devon is ranked 7th in the number of visits made and 3rd in the amount of spend associated with these visits.

Source: VisitEngland – GBTS 3 year averages 2017-2019

Tourism - National data



- In terms of expenditure, East Devon lies 2nd behind the city of Plymouth

- Devon as a whole accounts for c48mn total visits (day and overnight combined) with East Devon 3rd in terms of visits behind Plymouth and Exeter.

Source: VisitEngland – GBTS 3 year averages 2017-2019

Tourism - National data

Source: VisitEngland – GBTS 3 year averages 2017-2019

Local Data

East Devon– Value of Tourism 2020

Key Facts	
361,000	Staying visitor trips
1,718,000	Staying visitor nights
£85,333,000	Staying visitor spend
2,021,000	Day visits
£67,336,000	Day visitor spend
£152,669,000	Direct visitor spend
£2,889,837	Other related spend
£155,558,837	TOTAL VISITOR RELATED SPEND
3,438	Estimated actual employment
2,532	FTE employment
5%	Proportion of all employment

- Please note the 2020 values reflect the impact of Covid i.e. over 50% decrease on the 2017-2019 average.
- This is a reflection of the first lockdown and on-going restrictions enforced across the country.

Source: The Economic Impact of the East Devon Visitor Economy 2020 - The South West Research Company Ltd

Economic Sectors in East Devon

According to SIC codes and ONS data there is no one dataset that summarises the tourism industry.

Before Covid, nationally tourism was the 4th largest industry in the country therefore, it is logical to assume that tourism in East Devon should be in the top 5 economic sectors.

Looking at broad Industry groups:

- Real Estate is 22.1%
- Human Health and Social Work is 11.8%
- Wholesale and Retail (including motors) is at 11.1%
- Construction is 10.7%.
- Education is 6%
- Accommodation and food is 5%

However, we know that tourism is much bigger than just accommodation and food and therefore assume tourism would be placed 4th or 5th in the district and above Education.

Going forward, participation in the yearly economic impact studies undertaken by the South West Research Company for Devon County Council, will provide EDDC with a more realistic estimate.

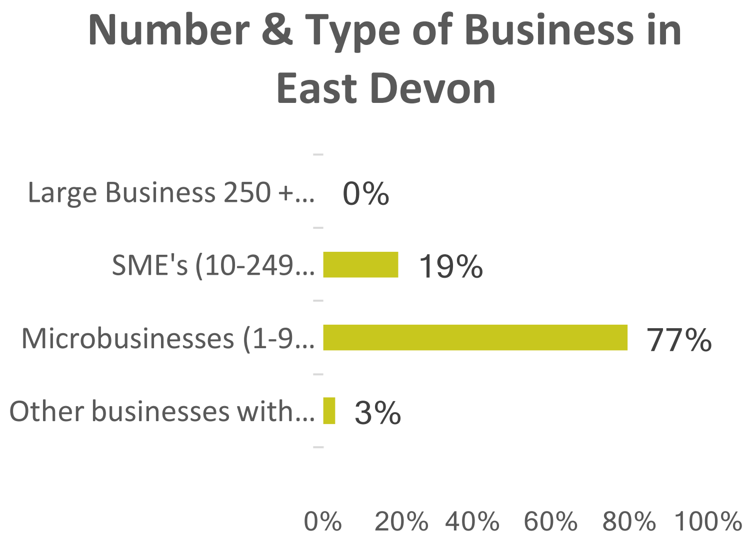
East Devon – Day Visits in the County Context

Area	Day visits (mn)	%	Day visit spend (£mn)	%
East Devon	**2.0**	**14**	**£67.3**	**13**
Exeter	0.9	6	£37.2	7
Mid-Devon	0.8	5	£26.5	5
North Devon	1.5	10	£50.3	10
Plymouth	2.1	15	£83.0	16
South Hams	1.9	13	£61.5	12
Teignbridge	1.9	13	£64.2	13
Torbay	1.7	12	£61.5	12
Torridge	0.9	6	£29.6	6
West Devon	0.8	5	£25.6	5

- East Devon contributes 14% of all day visits to Devon County and contributes over £67 million in spend, second only to Plymouth (15% and £83m respectively).

Source: The Economic Impact of the East Devon Visitor Economy 2020 - The South West Research Company Ltd

East Devon – Number of Businesses by Sector and Size



The largest type of business employer in East Devon are those classed as Micro-businesses employing between 1-9 people, accounting for 77% (4,305) overall. Large businesses employing over 250 people account for less than 1% (10) in East Devon. Almost a fifth (19%, 1,078) are small to medium enterprises (SME's) with other businesses who do not employ anyone, account for 3% (171) of all business types across the district.

List of Top 25 Businesses in East Devon by Employees	
FBE Realisations 2021 Ltd. Formerly known as FLYBE (now in limbo)	EXMOUTH HOSPITAL
LIVEWEST HOLMES LTD - Skypark	THE KING'S SCHOOL OTTERY ST MARY
HAVEN LEISURE LIMITED, Sandy Bay near Exmouth	SOUTH WEST HIGHWAYS LIMITED – Rockbeare
EAST DEVON DISTRICT COUNCIL – Honiton HQ	WAITROSE LTD - Sidmouth
THE DONKEY SANCTUARY	STILL MATERIALS HANDLING LIMITED – Hill Barton
LIDL GB LIMITED – Clyst Honiton warehouse	SOUTH WESTERN AMBULANCE SERVICE NHS - Skypark
DEVON AND SOMERSET FIRE AND RESCUE – HQ Clyst St George	TESCO STORES LTD – Honiton
EXETER AND DEVON AIRPORT LTD	SPAREX LIMITED – Exeter Airport
TESCO STORES LTD – Seaton	LED COMMUNITY LEISURE LTD – Exmouth Sports Centre
EXMOUTH COMMUNITY COLLEGE	THE CORNWALL COLLEGE GROUP – Bicton agricultural and land-based College
TESCO STORES LTD – Exmouth	CITY WEST COUNTRY LIMITED – Hill Barton
AXMINSTER TOOL CENTRE LTD	TED WRAGG MULTI ACADEMY TRUST – Cranbrook school
OTTER NURSERIES LIMITED – Ottery St Mary	SYNLAB VPG LIMITED – Exeter Science Park

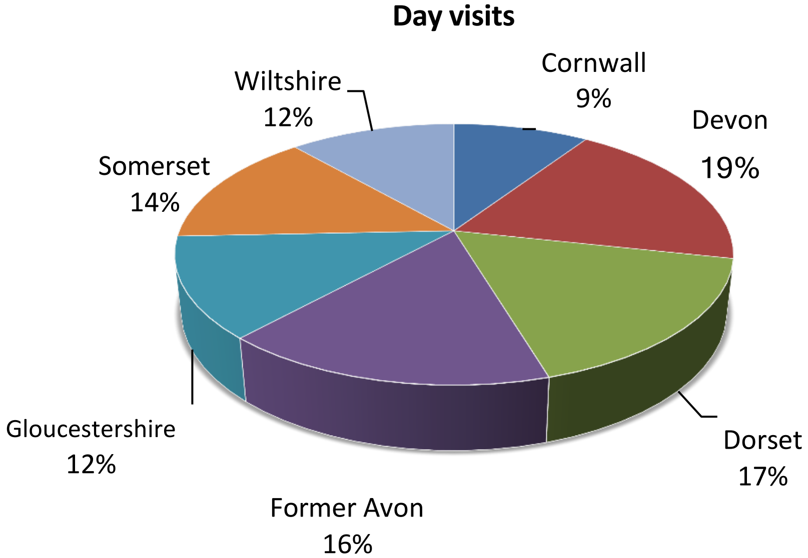
Of the top 25 businesses in East Devon by number of employees, only two, Haven Leisure Ltd and The

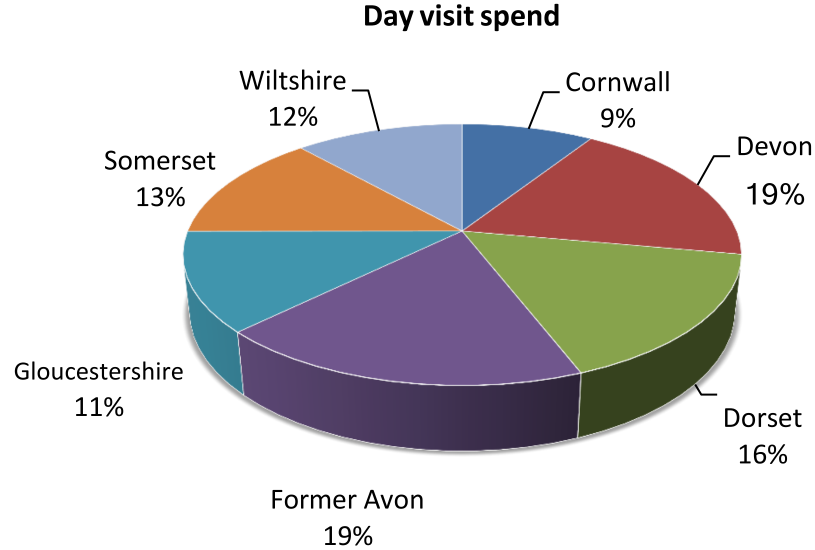
Source: Devon County Council

Donkey Sanctuary are recognised tourism businesses.

Source: Devon County Council

Devon - Day Visits in the Regional Context





Area	Day visits (millions)	Day visit spend (millions)
Cornwall	14.5	£501.9
Devon	**29.6**	**£1,037.3**
Dorset	26.4	£900.5
Former Avon	25.5	£1,024.0
Gloucestershire	19.5	£680.8
Somerset	22.1	£741.4
Wiltshire	17.7	£641.9

Devon - Day Visits in the Regional Context

Within the context of the South West total day visits, Devon received 19% of all day visits and day visit spend equating to 29.6 million trips and approximately £1 billion spend. Devon was again the the largest regional county in terms of the volume and value of day visits during 2019 and experienced broadly similar levels of day visits and spend for the third year in succession.

East Devon – Staying Visits by Accommodation Type

Domestic tourists	Trips	Nights	Spend	Overseas Tourists	Trips	Nights	Spend
Serviced	68,000	200,000	£16,669,000	Serviced	3,000	14,000	£926,000
Self catering	31,000	179,000	£10,637,000	Self catering	0	6,000	£286,000
Touring caravans /tents	18,000	96,000	£3,361,000	Touring caravans /tents	0	3,000	£93,000
Static vans/holiday centres	166,000	896,000	£38,471,000	Static vans/holiday centres	0	2,000	£100,000
Group/campus	0	0	£22,000	Group/campus	0	0	£20,000
Paying guest in private homes	0	0	£0	Paying guest in private homes	2,000	17,000	£696,000
Second homes	9,000	37,000	£1,768,000	Second homes	0	3,000	£142,000
Boat moorings	0	1,000	£46,000	Boat moorings	0	0	£0
Other	2,000	6,000	£297,000	Other	0	2,000	£71,000
Staying with friends and relatives	56,000	221,000	£10,461,000	Staying with friends and relatives	3,000	32,000	£1,270,000
Total	351,000	1,638,000	£81,731,000	Total	10,000	80,000	£3,602,000

- The largest share of staying visits in East Devon for domestic visitors is in Static vans/holidays centres, with a total of 166,000 trips, 896,000 nights and a total spend of £38,471,000. Serviced accommodation such as hotels, guesthouses, B&B’s etc. is top for overseas visitors with 3,000 trips, 14,000 nights and £926,000 associated spend.

Source: The Economic Impact of the East Devon Visitor Economy 2020 - The South West Research Company Ltd

Devon - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	1,660,000	4,760,000	£484,994,000
Self catering	526,000	2,988,000	£217,038,000
Touring caravans /tents	577,000	3,047,000	£106,107,000
Static vans/holiday centres	641,000	3,160,000	£159,343,000
Group/campus	100,000	280,000	£15,674,000
Paying guest in private homes	0	0	£0
Second homes	120,000	600,000	£17,451,000
Boat moorings	29,000	137,000	£6,855,000
Other	59,000	105,000	£4,876,000
Staying with friends and relatives	1,561,000	5,418,000	£172,016,000
Total	5,274,000	20,494,000	£1,184,354,000

Overseas tourists	Trips	Nights	Spend
Serviced	190,000	685,000	£65,756,000
Self catering	21,000	197,000	£14,225,000
Touring caravans /tents	26,000	141,000	£7,171,000
Static vans/holiday centres	3,000	17,000	£897,000
Group/campus	25,000	471,000	£34,758,000
Paying guest in private homes	16,000	329,000	£17,596,000
Second homes	3,000	56,000	£3,408,000
Boat moorings	0	0	£0
Other	16,000	91,000	£2,831,000
Staying with friends and relatives	158,000	1,372,000	£50,994,000
Total	458,000	3,360,000	£197,635,000

Serviced accommodation accounted for 32% of all staying trips, 23% of staying nights and 40% of staying spend to the county overall, with just minor variations in these proportions in recent years (since 2016). Similar to serviced accommodation, staying with friends and relatives accounted for 30% of all staying trips, although accounted for a larger proportion of staying nights (28%) but only 16% of staying spend with all measures similar to 2018. The next largest proportions of trips were in the Static vans/holiday centre sector and Touring caravans/tents (11% in each case) and Self catering (10%). There was little variation in the proportions of trips across all accommodation types compared to 2018.

East Devon - Direct Visitor Expenditure by Category

Information on the breakdown of visitor spending is available from the three main tourism and day visitor surveys by type of visitor. The Model divides the expenditure between five sectors:

- Accommodation
- Shopping for gifts, clothes and other goods
- Eating and drinking in restaurants, cafes and inns
- Entry to attractions, entertainment and hire of goods and services
- Transport and travel costs including public transport, purchase of fuel and parking

The following pages look at the breakdown of this expenditure and business turnover arising from this expenditure.

By applying the expenditure breakdown to the estimates of visitor spending the Model generates estimates of total spending by the five business sectors. Visitor expenditure in each sector represents additional turnover for businesses in those sectors. However, evidence from national studies suggests that some minor adjustments are required to match visitor spend to business turnover. In particular, some expenditure on food and drink actually takes place in inns and hotels that fall into the accommodation sector and at attractions. The turnover for each business sector has therefore been adjusted to take account of these marginal changes. More significantly, expenditure on travel costs associated with individual trips is as likely to take place at the origin of the trip as it is at the actual destination. It is therefore assumed that only 60% of total travel expenditure accrues to the destination area.

Source: The Economic Impact of the East Devon Visitor Economy 2020 - The South West Research Company Ltd

East Devon – Direct Visitor Expenditure by Category

Totals

Accommodation

		Totals
UK staying visitors	£31,566,000	
Overseas staying visitors	£1,049,000	
		£32,615,000 (21%)

Shopping

		Totals
UK staying visitors	£10,483,000	
Overseas staying visitors	£1,059,000	
Day visitors	£19,010,000	
		£30,552,000 (20%)

Food & drink

		Totals
UK staying visitors	£18,217,000	
Overseas staying visitors	£802,000	
Day visitors	£29,888,000	
		£48,907,000 (32%)

Attractions/entertainment

		Totals
UK staying visitors	£8,467,000	
Overseas staying visitors	£362,000	
Day visitors	£7,502,000	
		£16,331,000 (11%)

Travel

		Totals
UK staying visitors	£12,999,000	
Overseas staying visitors	£331,000	
Day visitors	£10,937,000	
		£24,267,000 (16%)

Source: The Economic Impact of the East Devon Visitor Economy 2020 - The South West Research Company Ltd

East Devon – Other Visitor Related Expenditure by Category

Second Homes

£510,000

Boats

£53,000

Visiting friends and relatives (non-visitor spend)

£2,327,000

- Spend on second homes estimates cover rates, maintenance, and replacement of furniture and fittings.
- Spend on boats estimates cover berthing charges, servicing and maintenance and upgrading of equipment.
- Additional spending is incurred by friends and relatives as a result of people coming to stay with them.

Source: The Economic Impact of the East Devon Visitor Economy 2020 - The South West Research Company Ltd

East Devon – Tourism Related Employment

Having identified the value of turnover generated by visitor spending in each business sector it is possible to estimate the employment associated with that spending.

The use of visitor expenditure to generate job numbers underestimates the number of jobs arising in the attractions/entertainment sector. The underestimate arises because local authorities and voluntary bodies do not always seek to recoup the full operating costs of individual attractions of facilities from entrance charges. Therefore an additional percentage of direct employment is added to the attractions sector estimates to take account of this factor.

This looks at employment on three levels;

- **Direct Jobs** - Direct jobs are those in businesses in receipt of visitor spending. For example, jobs supported by visitor spending at a hotel would be direct jobs.

- **Indirect Jobs** - Indirect employment arises as a result of expenditure by businesses in direct receipt of visitor expenditure on the purchase of goods and services for their businesses. For example, some of the employment at a business supplying food and drink may be supported through the supplies that the business sells to hotels (or any other business in direct receipt of visitor expenditure).

- **Induced Jobs** - Induced jobs are those that are supported by the spending of wages by employees in direct and indirect jobs. Such spending will be spread across a wide range of service sectors.

Estimates are shown for actual jobs and full time equivalent jobs (FTE's).

Source: The Economic Impact of the East Devon Visitor Economy 2020 - The South West Research Company Ltd

East Devon – Tourism Related Employment

Estimated actual employment

Direct	Indirect	Induced	Total
2,479	696	262	3,438

Full time equivalent employment (FTE's)

Direct	Indirect	Induced	Total
1,692	611	230	2,532

Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	439	8	447
Retailing	89	147	236
Catering	232	365	597
Attractions/entertainment	145	127	272
Transport	52	43	95
Arising from non trip spend	45	0	45
Total Direct	1,002	689	1,692

Source: The Economic Impact of the East Devon Visitor Economy 2020 - The South West Research Company Ltd

East Devon – Net Zero Businesses

The Government's stance on net zero is that taking action on climate change will help businesses grow help to seize new opportunities, create new jobs, encourage investment and adapt against the challenges of a changing planet. It also believes that by reducing emissions, businesses across the UK will be able to:

- lower their running costs – and save money as a result
- attract new customers and investors
- maintain a competitive advantage, both locally and globally
- qualify for tax benefits
- build a better, more sustainable supply chain

Figures for net zero businesses in East Devon include;

- 107 Net Zero businesses as of 2022
- As a locality it has a location quotient of 3 for Net Zero businesses i.e. 3x the UK local authority average. Orkney is highest with 14.4x and Merthyr Tydfil is lowest with 0.3x
- Its Net Zero businesses employed 527 people at last count – this is an employee location quotient of 1.7 i.e. x1.7 times the national average rate
- Its Net Zero businesses had an annual turnover of £72.2m at last count – the same as Welwyn Hatfield in Hertfordshire and only slightly less than Cambridge, although its location quotient for Net Zero businesses by turnover was slightly below the national average.

Source: Data City for Devon County Council 2022

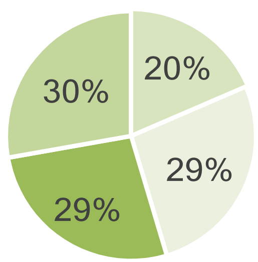
Type of Visitor

Type of Visitor - Devon

Ever Visited Devon

70%

Time since Last Visit



Visited Destination in the last 3 years

Gender	Devon	Great Britain
Male	56%	49%
Female	44%	51%

Age	Devon	Great Britain
18-24	15%	14%
25-34	15%	16%
35-44	19%	17%
45-54	17%	18%
55-64	16%	15%
65+	18%	20%

Region of Origin	Devon	Great Britain
Wales	4%	5%
Scotland	4%	9%
North East	3%	4%
North West	11%	11%
Yorkshire/ Humberside	6%	9%
East Midlands	7%	7%
West Midlands	11%	9%
East Anglia/ East of England	9%	10%
Greater London	14%	13%
South East	21%	14%
South West	11%	9%

- The majority of domestic British holiday makers havevisited Devon at some point in their lives. Comparedwith the rest of GB, the average visitor to Devon is more likely to be male and from the South-East.

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Source: VisitEngland – Devon Destination Report

Destination Comparisons

The following section is looking at destinations across England and their similarities to East Devon including coastline and AONB areas.
The data used is from Visit England's series of destination reports, which looks at the satisfaction and perceptions of destinations across England.

Specific data for East Devon is unavailable and therefore County data for Devon is used for comparison purposes.

Consideration, Loyalty and Rejection

Loyalty Ladder

	Devon	Dorset	Norfolk	Northumberland	Somerset	Suffolk
Loyal (I often/sometimes take holidays there and intended to in the next year/couple of years)	**33%**	24%	19%	17%	17%	14%
Considerers (I have been/never been to this destination before but would like to in the future)	**51%**	53%	53%	50%	56%	49%
Rejecters (I have been/never been to this destination before and am not likely to do so in the future)	**12%**	15%	20%	23%	19%	25%

Devon has a good level of loyalty, higher than all other comparator destinations, alongside this is a fairly low level of people who have never been to Devon and are not likely to visit in the future. Overall, Devon has a loyal base of visitors who make repeat visits on a regular basis and those who have never been but would like to in the future.

Q: Thinking about regions or places within the UK. For each, please indicate which ONE statement most applies?

(1) I often take short breaks or holidays there and intend to do so again within the next year
(2) I sometimes take short breaks or holidays there and intend to do so again in the next couple of years
(3) I have taken a short break or holiday there once or twice before and might do so again
(4) I have never been on a holiday or short break there but would like to
(5) I have taken a short break or holiday there before, but am unlikely to do so again
(6) I have never taken a short break or holiday there before and am not likely to in the future
(7) I don’t know this destination/ cannot answer the question

Source: VisitEngland, quadrangle, Kubi Kalloo

Satisfaction & Intention to Visit

	Devon	Dorset	Norfolk	Northumber land	Somerset	Suffolk
Satisfaction	**46%**	47%	47%	67%	57%	47%
Likelihood to revisit	**8.1**	8.1	8.4	9.0	8.7	8.3

In terms of satisfaction, Devon is rated lower than Northumberland and Somerset but on a par with Dorset, Norfolk and Suffolk. Although we have already seen high levels of loyalty to Devon, the propensity to revisit is lower than four of its comparators with only Dorset seeing similar repeat levels of visitors.

SATISFACTION - Q:Thinking of this most recent trip, how would you rate your experience of [destination] overall in terms of a holiday or short-break? Provide us with an overall score where 10 is excellent and 1 is not good at all.

LIKELIHOOD TO REVISIT - Q: And now, thinking about the future, please use the scale to indicate how likely you are to visit [destination] again" (Respondents are presented with a 10 point scale where 10 is definitely will visit and 1 is will definitely will not visit') - The likelihood to revisit value corresponds to the average score from responses to the question

July 22

Source: VisitEngland, quadrangle, Kubi Kalloo

Destination Attribute Satisfaction

The destination attribute satisfaction scores look at the top ratings received on a 1-5 scale so those figures shown in the following slides are based on anyone who gave a score of 4/5. (see note on slide 26).

Across all the satisfaction scores, Devon was below or on a par with its comparators. The quality of the natural environment was the highest score across all attributes (80%), slightly above Dorset and Norfolk but below, Northumberland, Somerset and Suffolk.

Thematic Images Endorsement

Respondents are asked to select which of the destinations, if any, they associate with each statement.

Respondents agreed that the top five images of Devon were coastal, rural areas, seaside, food and drink and for family. Shopping and image was felt less to be associated with Devon. The images for Northumberland was of a rural destination and nature, highest amongst all destinations.

Perceptions of Destination

The perceptions of destination percentage is calculated from the percentage agreement with each statement.

The top perception for Devon was that it is beautiful, the highest across all comparators. In general, respondents agreed with many of the perception listed with Devon receiving higher scores when compared with the other destinations comparing well to all other destinations

Destination Attribute Satisfaction

	Devon	Dorset	Norfolk	Northumberland	Somerset	Suffolk
The quality of the natural environment	**80%**	78%	77%	95%	87%	84%
Being welcoming and friendly	**74%**	73%	76%	90%	80%	77%
The quality of food & drink	**71%**	72%	71%	82%	72%	74%
The quality of accommodation options	**70%**	71%	73%	78%	73%	67%
The customer service given	**67%**	66%	67%	80%	72%	75%
The availability of information about the destination before you get there	**67%**	65%	67%	76%	68%	63%
The availability of information about the destination once you're there	**66%**	66%	70%	79%	67%	65%
The ease of getting around the destination	**65%**	68%	70%	78%	70%	60%
Its overall value for money	**65%**	65%	68%	81%	67%	61%
Offering a distinctive, authentic experience	**64%**	64%	63%	83%	70%	61%
Its history and heritage (famous buildings, castles, monuments)	**64%**	N/A	63%	93%	69%	60%
The range of attractions and things to do	**63%**	63%	66%	77%	72%	60%
The shopping opportunities	**62%**	N/A	N/A	N/A	N/A	N/A
Having beautiful beaches	**N/A**	78%	N/A	N/A	N/A	N/A
Having a good range of outdoor activities	**N/A**	N/A	N/A	72%	69%	71%
The availability of individual/independent local shops	**N/A**	N/A	64%	71%	65%	58%
The ease of getting to the destination	**N/A**	63%	N/A	66%	65%	60%

Destination attribute satisfaction *- Q:"And thinking about this holiday or short break, please tell us how you would rate [destination] on the following attributes using the scale below:" (Respondents are presented with a 5 point scale from excellent to poor, where 5 is excellent and 1 is poor.*

The attribute satisfaction percentage corresponds to the proportion of respondents selecting the top two box (4 or 5 on the scale)

Source: VisitEngland, quadrangle, Kubi Kalloo

Thematic images endorsement

	Devon	Dorset	Norfolk	Northumberland	Somerset	Suffolk
Coastal	**69%**	67%	45%	55%	51%	42%
Rural	**67%**	66%	57%	62%	67%	57%
Seaside	**72%**	64%	49%	30%	50%	46%
Food and beverage	**65%**	57%	56%	52%	55%	50%
Family	**63%**	55%	55%	53%	55%	51%
Friends	**59%**	55%	56%	54%	58%	54%
Relax	**57%**	55%	50%	52%	52%	49%
Historic	**54%**	52%	43%	55%	48%	38%
Nature	**45%**	44%	41%	62%	39%	35%
Festivals	**43%**	42%	37%	38%	47%	38%
Adventure Sport	**43%**	36%	30%	47%	34%	29%
Sports	**47%**	36%	43%	48%	42%	37%
Arts	**32%**	32%	35%	35%	30%	33%
Shopping	**32%**	32%	36%	32%	35%	36%

Thematic image endorsement (%) *- Thematic image endorsement percentage is calculated from the percentage of agreement with each image*

Q: "Now we are going to show you a list of things people have said about different destinations for holidays and short breaks in the UK. Thinking about each statement, please indicate which destination in each row you associate with that statement. You can select as many or as few for each statement as you like, or 'None of these' if you don't think the words describe any of the destinations shown." Respondents are asked to select which of the destinations, if any, they associate with each statement

Source: VisitEngland, quadrangle, Kubi Kalloo

Perceptions of Destination

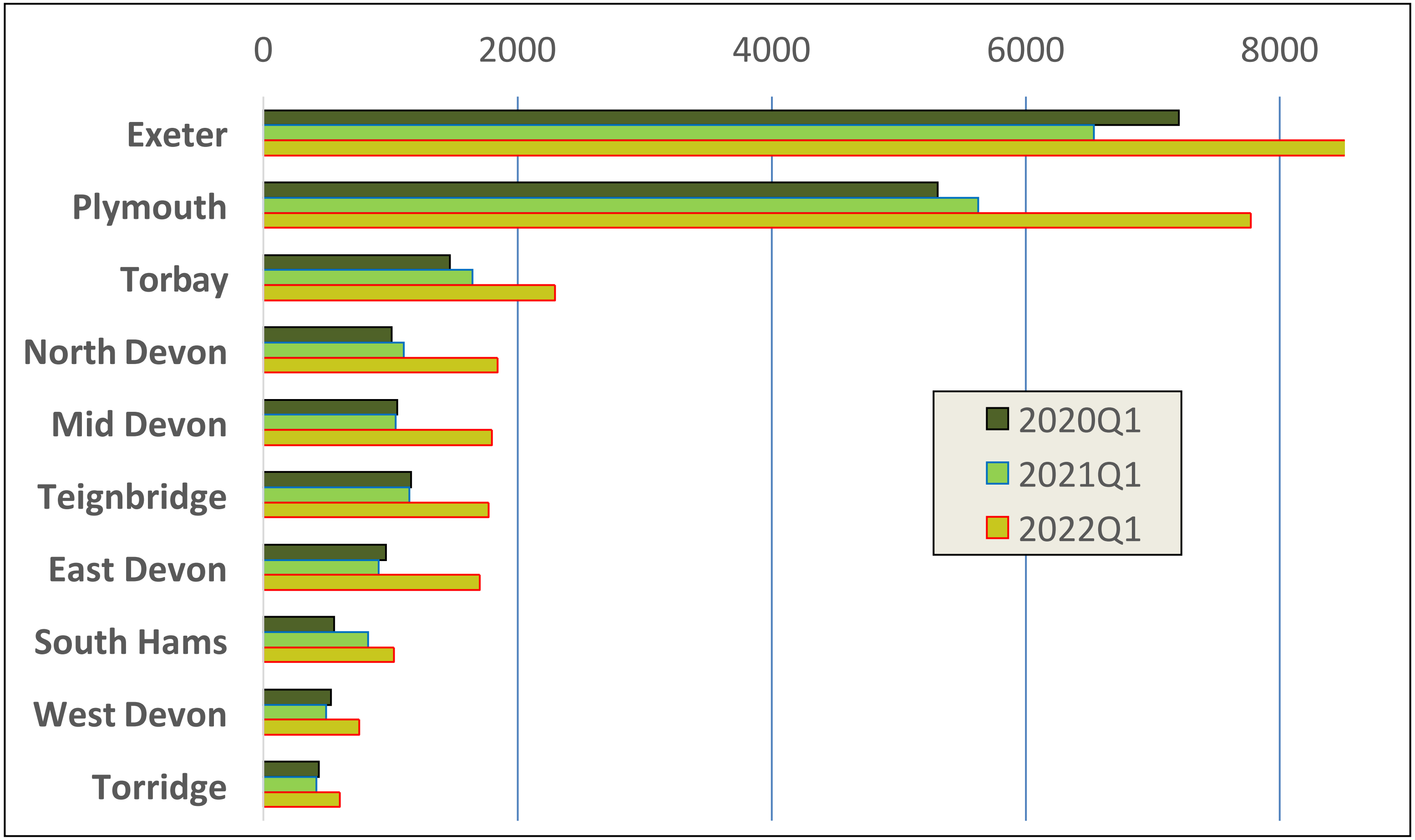
	Devon	Dorset	Norfolk	Northumberland	Somerset	Suffolk
Beautiful	83%	71%	59%	67%	67%	54%
Relaxing	79%	76%	69%	66%	74%	66%
Lots to see and do	77%	73%	67%	71%	69%	58%
Quality accommodation	75%	72%	67%	68%	70%	63%
Welcoming	75%	71%	65%	67%	70%	61%
Distinct identity	72%	63%	64%	65%	60%	53%
Authentic	71%	67%	65%	68%	64%	57%
Fun	71%	60%	56%	57%	61%	50%
Traditional	70%	59%	59%	56%	59%	52%
Breath taking	66%	54%	40%	62%	45%	36%
For all seasons	59%	55%	54%	52%	55%	55%
Romantic	58%	54%	42%	47%	45%	41%
Value for money	55%	54%	56%	60%	58%	51%
Exciting	54%	46%	42%	48%	42%	37%
Easy to get to	53%	57%	50%	48%	55%	52%
More for the old	48%	48%	46%	42%	48%	47%
Out of the ordinary	44%	42%	40%	53%	37%	34%
Stylish	44%	42%	39%	33%	39%	37%
Upmarket	36%	41%	36%	29%	35%	33%
More for the young	33%	29%	30%	27%	26%	26%

Perceptions of Destination *- The perceptions of destination percentage is calculated from the percentage agreement with each statement*

Source: VisitEngland, quadrangle, Kubi Kalloo

Skills Audit

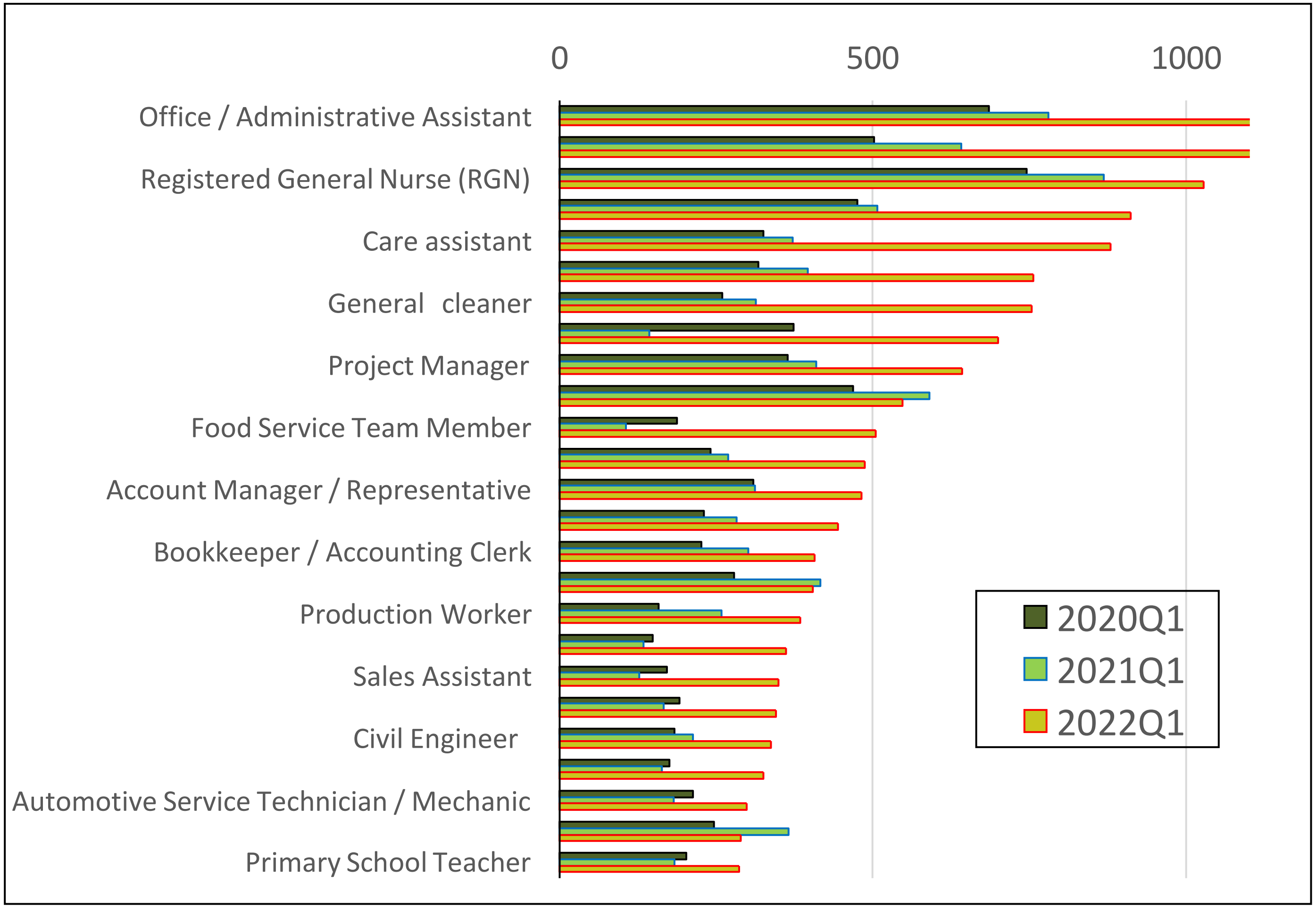
Devon Job Vacancies by District / City



July 22

Source: Burning Glass Technologies, Labour Insights

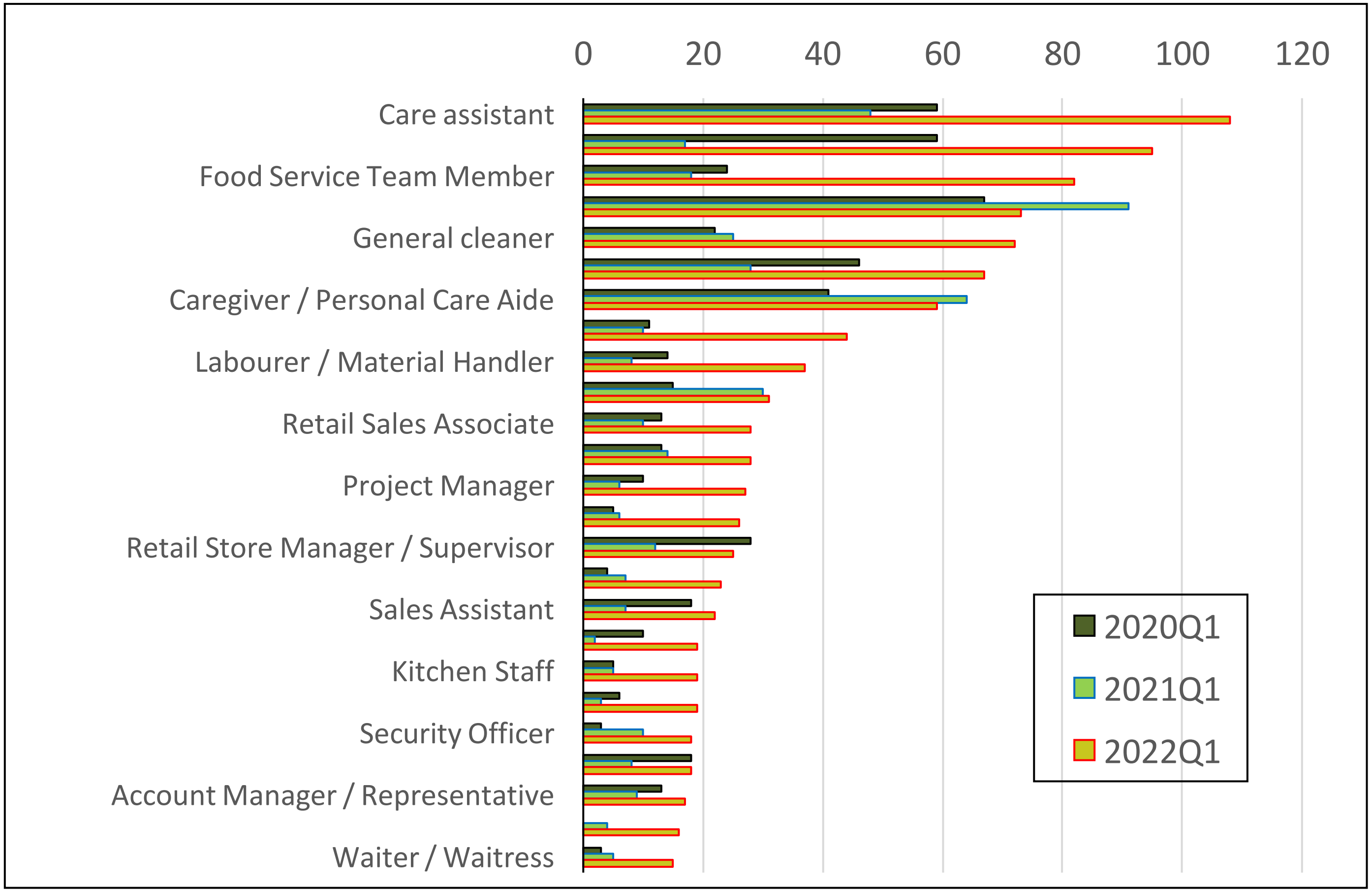
Devon BGTOCC Occupations in Highest Demand Q1 2022



July 22

Source: Burning Glass Technologies, Labour Insights

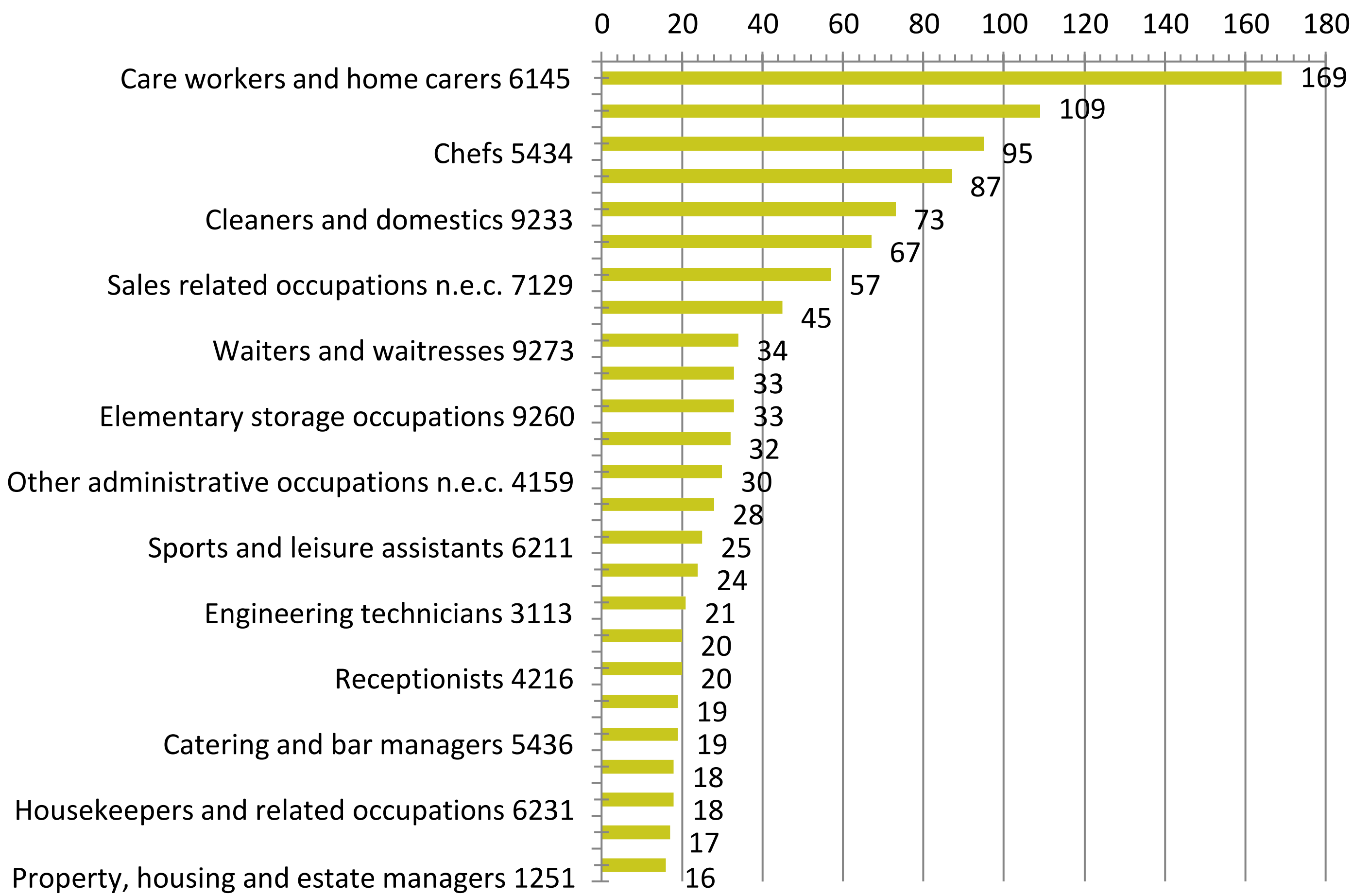
East Devon Occupations in Highest Demand Q1 2022



July 22

Source: Burning Glass Technologies, Labour Insights

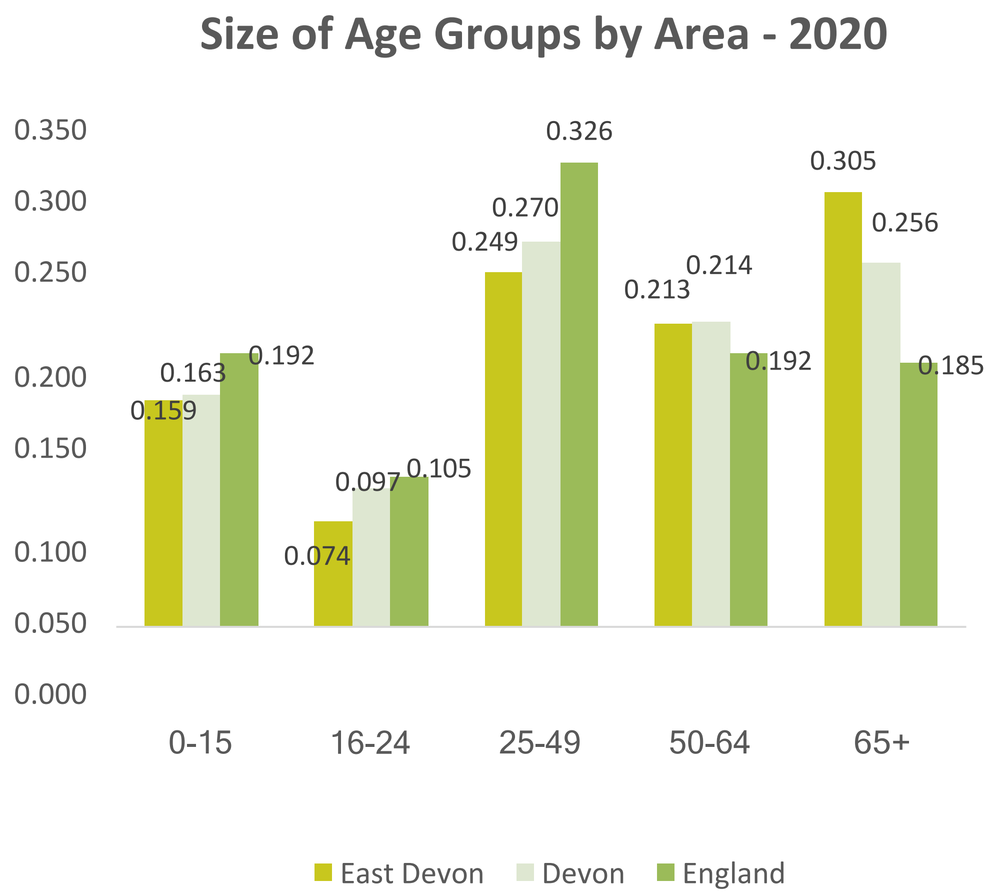
East Devon Job Adverts by Occupation Q1 2022 (4 Digit SOC)



July 22

Source: Burning Glass Technologies, Labour Insights

Age Profile: Area Comparison



Size of age groups by area and single year (2020)

July 22

Source: Devon County Council and Wavehill Social & Economic Research

Industry Employment 2020 – East Devon

The employment structure of East Devon is more heavily concentrated on the relatively low paying industries such as Wholesale and Retail and Accommodation & food services due to seasonal tourism within the district than across Devon and England. Part time employment in East Devon is also higher with 39% of employees employed on this basis compared to 38% in the Devon CC area and 32% across England. There is also a much greater proportion of Agricultural employment (similar to the rest of Devon) due to the rural nature of the country and local area.

Construction employment in the district is also higher than across the rest of Devon or England with a greater proportion of employment within 'construction of buildings', 'civil engineering' and 'specialist construction activities'. The largest construction employer is South West Highways Limited with the majority of construction firms being small and medium sized enterprises (SME's)

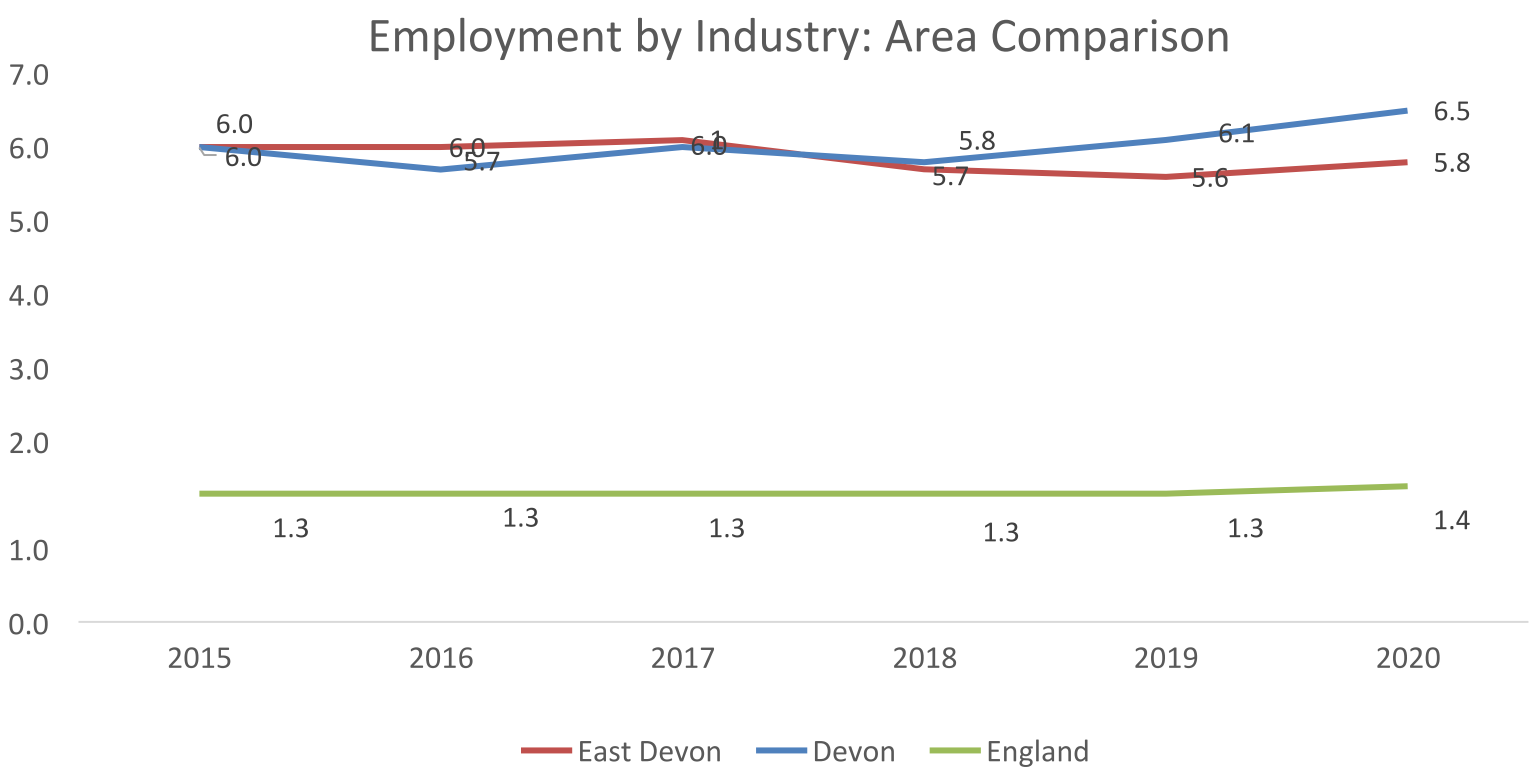
As well as employment in the district, there is also a significant commuter flow in to Exeter for the workforce in East Devon. While the jobs density (measuring the ratio of jobs to population aged 16-64) was 0.82 in East Devon during 2019, the comparative figure for Exeter was 1.22 (indicating more jobs than workers). The effect of the Pandemic in 2020 would have been to have reduced commuter flows, but the ongoing potential for more remote and flexible working may improve the availability of well-paid skilled jobs locally working within East Devon.

Industry Employment 2020 – East Devon

Industry Employment 2020	East Devon	East Devon	Devon	England
	Number	% of Employment		
A : Agriculture, forestry and fishing	3,000	5.6	6.1	1.3
B : Mining and quarrying	150	0.3	0.2	0.1
C : Manufacturing	3,000	5.6	7.5	7.8
D : Electricity, gas, steam and air conditioning	100	0.2	0.4	0.4
E : Water supply; sewerage, waste management	300	0.6	0.7	0.6
F : Construction	4,500	8.3	6.6	5.0
G : Wholesale and retail trade; repair of motors	10,000	18.5	17.4	15.1
H : Transportation and storage	3,500	6.5	3.6	5.0
I : Accommodation and food service activities	7,000	13.0	10.5	7.5
J : Information and communication	1,250	2.3	2.5	4.4
K : Financial and insurance activities	400	0.7	1.2	3.5
L : Real estate activities	1,500	2.8	2.2	2.0
M : Professional, scientific and technical activities	3,000	5.6	6.6	9.2
N : Administrative and support service activities	2,250	4.2	5.5	8.9
O : Public administration and defence	1,250	2.3	3.9	3.9
P : Education	4,000	7.4	8.0	8.4
Q : Human health and social work activities	6,000	11.1	12.4	12.4
R : Arts, entertainment and recreation	1,500	2.8	2.5	2.5
S : Other service activities	1,750	3.2	1.9	2.1
Total	54,000	100	100	100

Source: Nomis - Business Register and Employment Survey

Tourism - National data



Number and percentage of people in employment in single industry section by area over time

July 22

Source: Devon County Council and Wavehill Social & Economic Research

Retail Vacancy Rates

RETAIL VACANCY FOR TOWN CENTRES – EAST DEVON

View from the hill

High vacancy rates on high streets is detrimental to the visitor experience. This data indicates that Axminster and Ottery St Mary have a less than ideal occupancy rate, impacting negatively on any customer experience.

Town	Vacancy Rate	Date Last Visited	Change in Vacancy Rate
Axminster	18.1%	Oct-21	
Ottery St Mary	12.5%	Oct-21	
Exmouth	10.4%	Feb 22	↑
Budleigh Salterton	8.5%	n/k	
Honiton	8.3%	Nov-21	↓
Seaton	7.7%	Oct-21	
Sidmouth	3.1%	Oct-21	

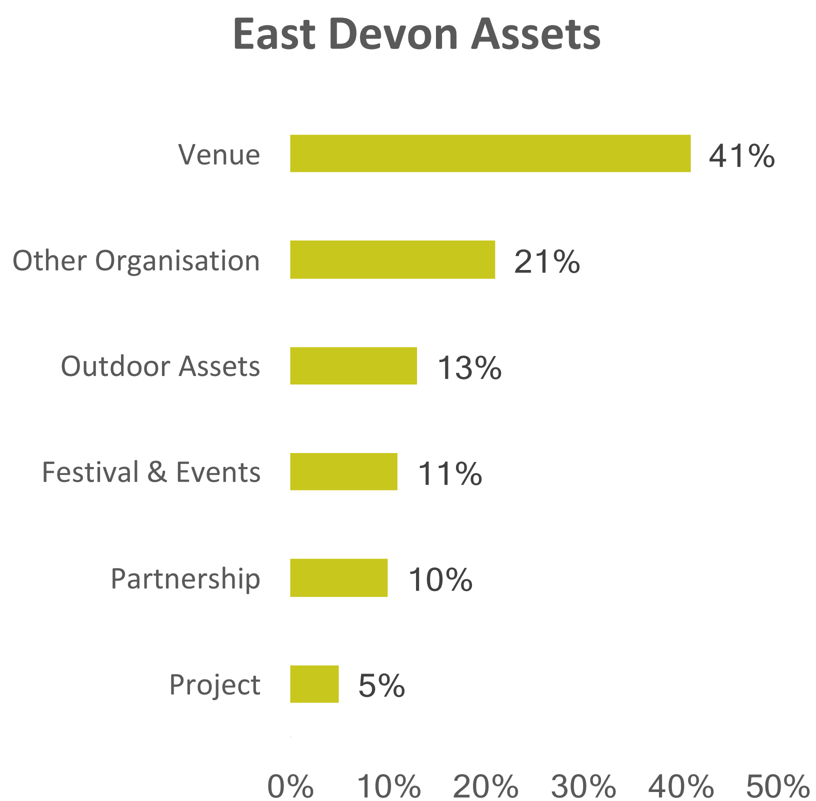
East Devon District Council

July 22

Source: Local Data Company

East Devon Assets

East Devon Assets



Venues make up the largest segment of cultural assets in East Devon with 41% identified. Other organisations include visual and performing arts and make up 21% of assets.

The District has a strong, network of smaller cultural assets, some of which have the potential to be developed further to attract visitors.

Source: EDDC Cultural Strategy

East Devon Assets

Festivals/Events	Beautiful Days	Other Organisation or Business	Ark Pottery
Festivals/Events	Blackdown Hills Music and Beer Festival	Other Organisation or Business	Art Sidmouth
Festivals/Events	Budleigh Music Festival	Other Organisation or Business	Azure
Festivals/Events	Budleigh Salterton Literary Festival	Other Organisation or Business	Brook Gallery
Festivals/Events	East Devon Music Festival	Other Organisation or Business	Daves Art Gallery
Festivals/Events	Exmouth Festival 2022	Other Organisation or Business	Ellas Studio
Festivals/Events	Exmouth Folk Club	Other Organisation or Business	Finn Studio
Festivals/Events	Exmouth Folk Club Dance	Other Organisation or Business	Folk Orchestra of East Devon
Festivals/Events	Exmouth Folk Dance Club	Other Organisation or Business	Hybrid Gallery
Festivals/Events	Exmouth Pride 2022	Other Organisation or Business	Ludgate Gallery
Festivals/Events	Festival On the Hills	Other Organisation or Business	South West Art
Festivals/Events	Goren Festival	Other Organisation or Business	Triptych Gallery and Framing
Festivals/Events	Jurassic Folk	Project	Wetlands Sculpture Trail
Festivals/Events	Lympstone Folk, Roots and Acoustic	Venue	A La Ronde, National Trust
Festivals/Events	Mulberry House Fifith Sunday Singing	Venue	Axe Valley Heritage Museum
Festivals/Events	Sid Folk Choir	Venue	Bicton Arena
Festivals/Events	Sidmouth Acoustic Folk Club	Venue	Escot House
Festivals/Events	Sidmouth Folk Festival	Venue	Exmouth Pavilion
Festivals/Events	Sidmouth Sea Fest	Venue	King of Clubs
Festivals/Events	The Tar Barrels of Ottery St Mary	Venue	Manor Pavilion Theatre
Festivals/Events	The Tar Barrels of Ottery St Mary	Venue	Marine House at Beer
Festivals/Events	Thee Festival	Venue	Ocean Exmouth
Festivals/Events	WooHoo Art Events	Venue	Smeatharpe Stadium
Festivals/Events	Yarty Party Festival	Venue	The Gateway Theatre

Source: EDDC Cultural Strategy

Appendix 3 - Mapping of Businesses in East Devon

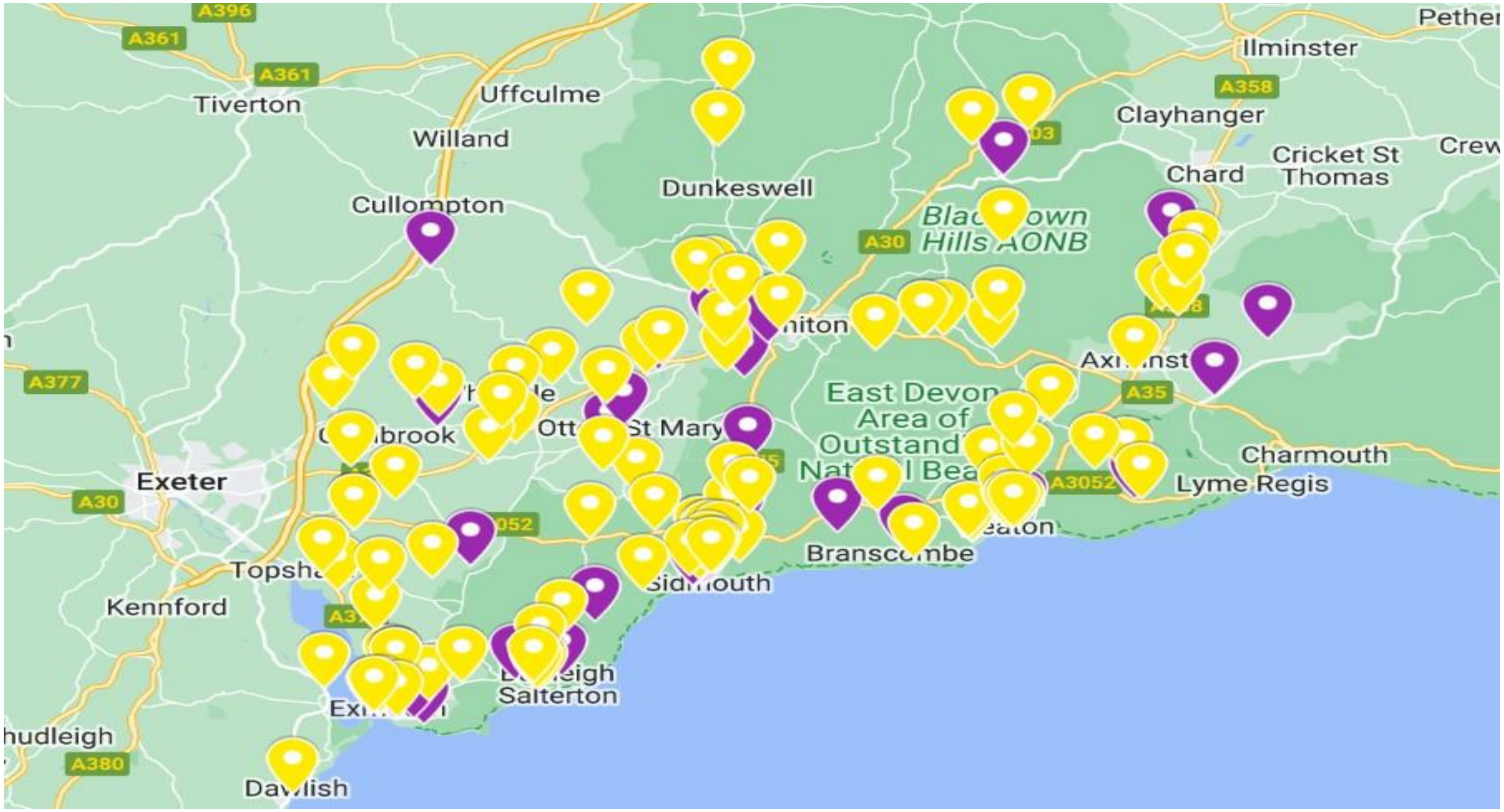
July 22

Mapping of Tourism Business across East Devon

The following charts are based on the East Devon Accommodation and Attraction database. The maps are shown for Accommodation (Hotels (57), B&Bs, Guesthouses and Farmhouses – 114 establishments). Self-catering cottages and lodges (758), caravan, camping and holiday parks (87), hostels (2) and attractions (58). Each sector is identified by the colour shown below. It should be noted that this may not include all tourism businesses.

- Self Catering
- Hotels & Inns
- B&Bs_Guesthouses_Farmhouse
- Caravan_camping_holiday park
- Hostel
- Attractions

Map of Serviced Accommodation across East Devon

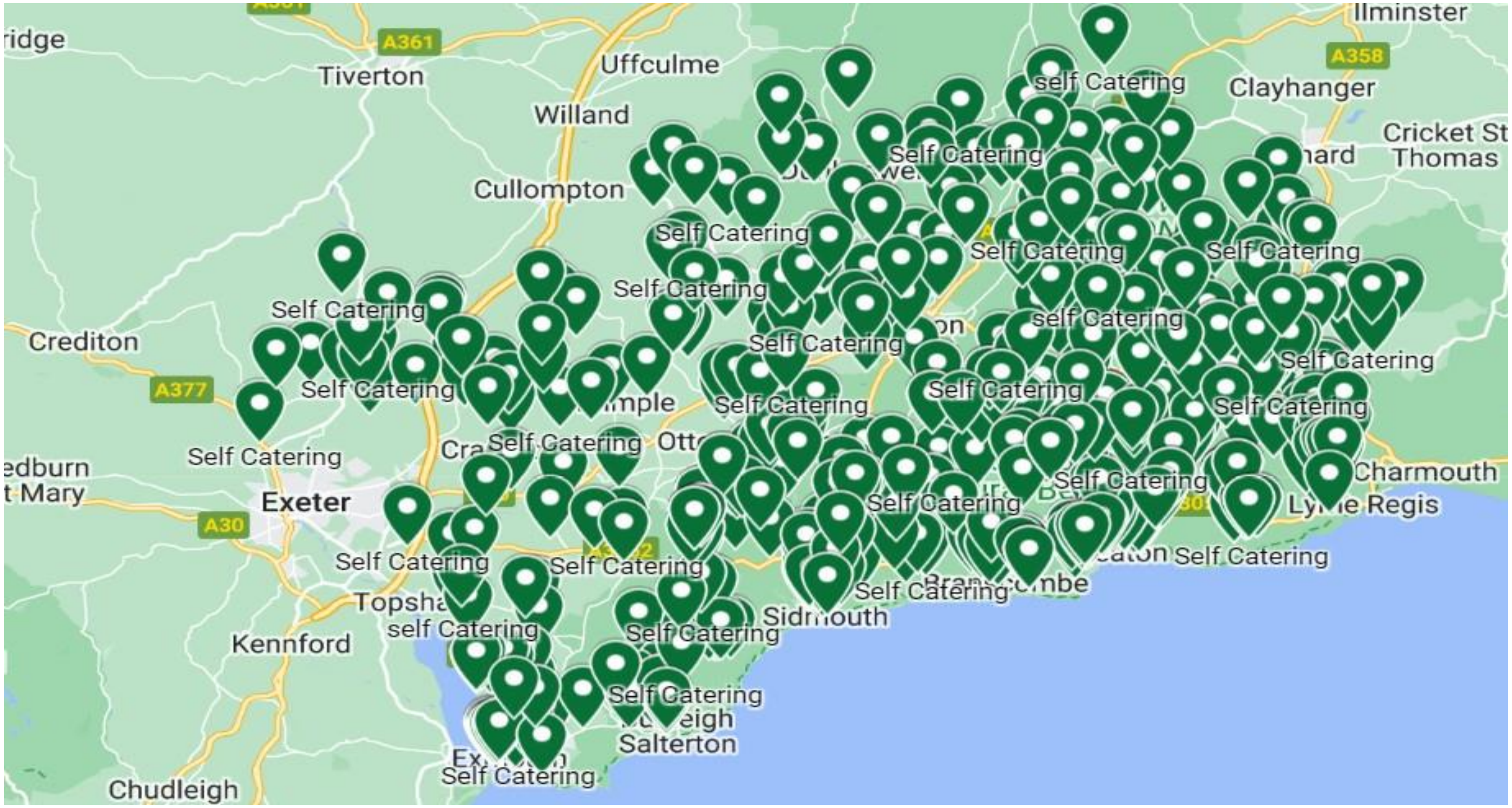


Serviced accommodation is good, though there may be some potential for a small offer in East Devon AONB, if proposed in a way that is sympathetic to the natural environment.

East Devon District Council

July 22

Map of Self-Catering Accommodation across East Devon



The self-catering provision is strong across the district with a fairly even spread across the area as a whole.

Map of Caravan and Camping Sites in East Devon

There is a concentration of caravan and camping sites located in coastal areas, with some potential to increase the offer in inland areas. This would need to be balanced against sufficient demand.

Map of Attractions and Places to Visit in East Devon

There is an even spread across both coastal and inland location for attractions and general places to visit. There is potential to encourage attractions to the east of the district, around Blackdown Hills AONB or Axminster on the Dorset border.